FOR TRAINEES: How to use Intrain – the College's Electronic Records and Forms System
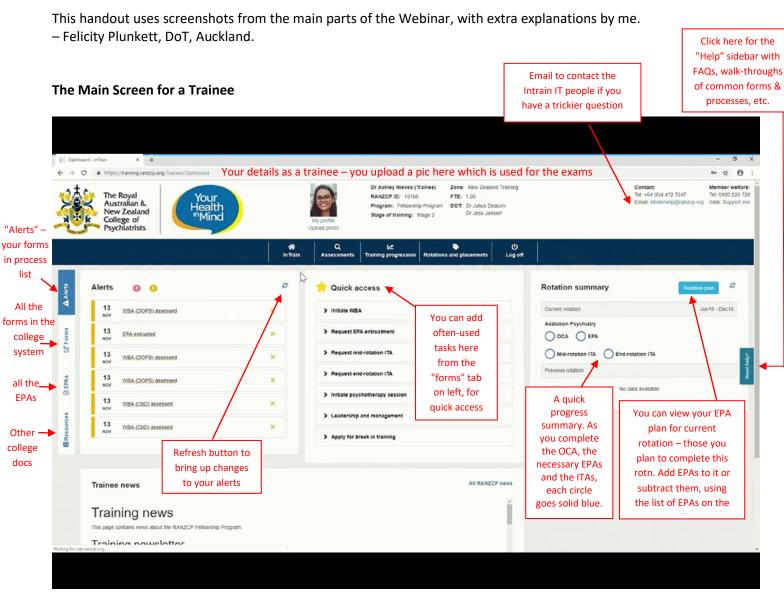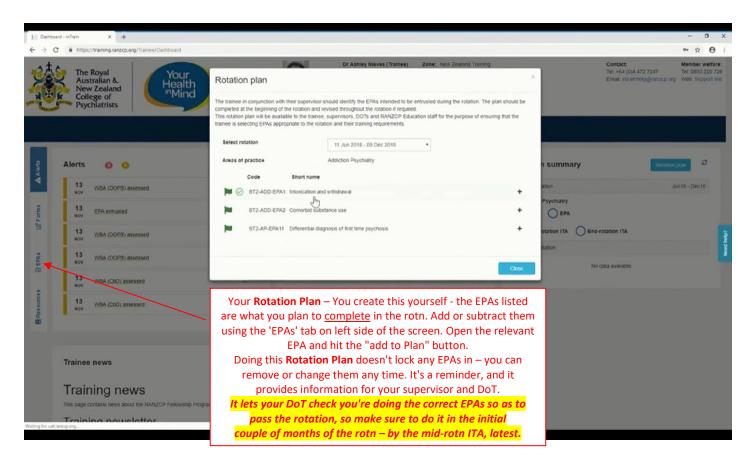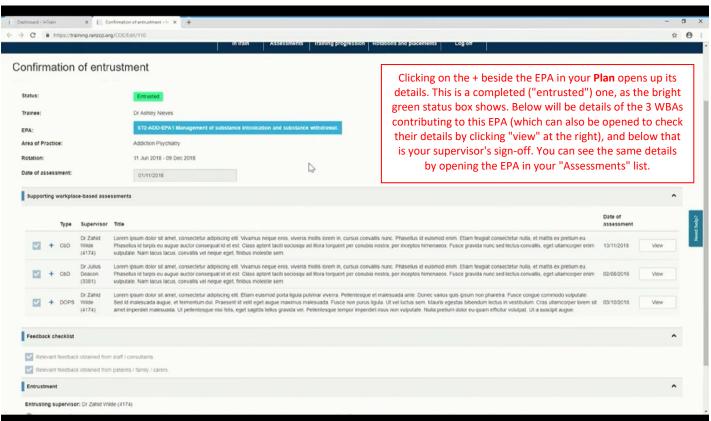
Once you get your College login and starter password, all you really need is to read this handout and also go into the Intrain system and explore it directly.
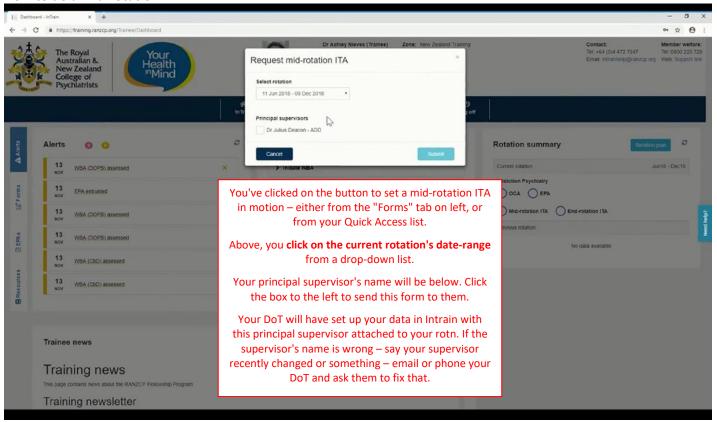
There are also videos about Intrain and a Webinar (although they won't be 100% accurate any more as there have been several tweaks to the system since they were made in late 2018). To locate the videos & Webinar, on the college website www.ranzcp.org go into the Learn*it* system and either look at the base of the Learn*it* front page, about 2nd from the end, or search that site on "Intrain". If you watched it before it'll say "review", if not it'll say "open" – click on that. This gets you to options where you can choose the videos for Trainees, and within that, 3 initial brief overview vids are loaded, as well as the ~50 minute Webinar. Unfortunately in the first 5 minutes of the Webinar, the screenshots of Intrain shown are fairly unfocussed and not easily readable. But it gets better after the intro with clearer screens as they demo various bits of Intrain in more detail. The brief videos are however sharp and easy to see, demonstrating the main interface you'll use, so best to start with them.

This handout uses screenshots from the main parts of the Webinar, with extra explanations by me.
– Felicity Plunkett, DoT, Auckland.

The Main Screen for a Trainee

Click here for the "Help" sidebar with FAQs, walk-throughs of common forms & processes, etc.

Email to contact the Intrain IT people if you have a trickier question

Your details as a trainee – you upload a pic here which is used for the exams

"Alerts" – your forms in process list

All the forms in the college system

all the EPAs

Other college docs

Refresh button to bring up changes to your alerts

You can add often-used tasks here from the "forms" tab on left, for quick access

A quick progress summary. As you complete the OCA, the necessary EPAs and the ITAs, each circle goes solid blue.

You can view your EPA plan for current rotation – those you plan to complete this rotn. Add EPAs to it or subtract them, using the list of EPAs on the

Your **Rotation Plan** – You create this yourself - the EPAs listed are what you plan to complete in the rotn. Add or subtract them using the 'EPAs' tab on left side of the screen. Open the relevant EPA and hit the "add to Plan" button.
Doing this **Rotation Plan** doesn't lock any EPAs in – you can remove or change them any time. It's a reminder, and it provides information for your supervisor and DoT.
It lets your DoT check you're doing the correct EPAs so as to pass the rotation, so make sure to do it in the initial couple of months of the rotn – by the mid-rotn ITA, latest.

Clicking on the + beside the EPA in your **Plan** opens up its details. This is a completed ("entrusted") one, as the bright green status box shows. Below will be details of the 3 WBAs contributing to this EPA (which can also be opened to check their details by clicking "view" at the right), and below that is your supervisor's sign-off. You can see the same details by opening the EPA in your "Assessments" list.
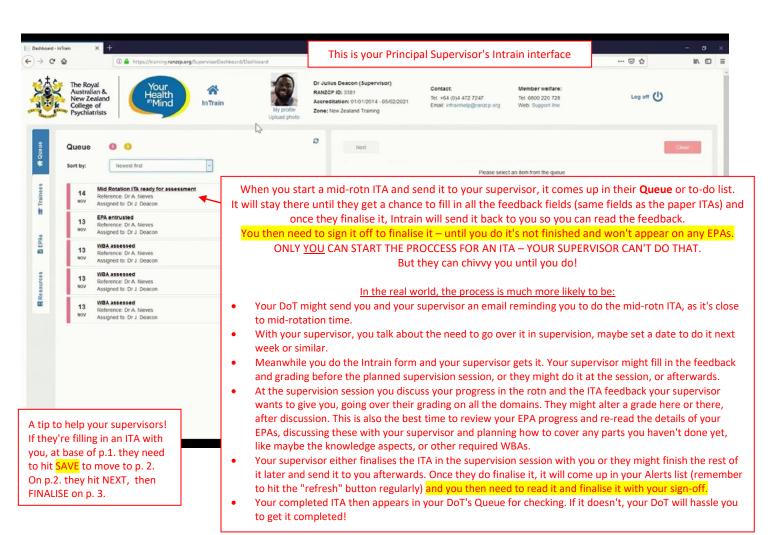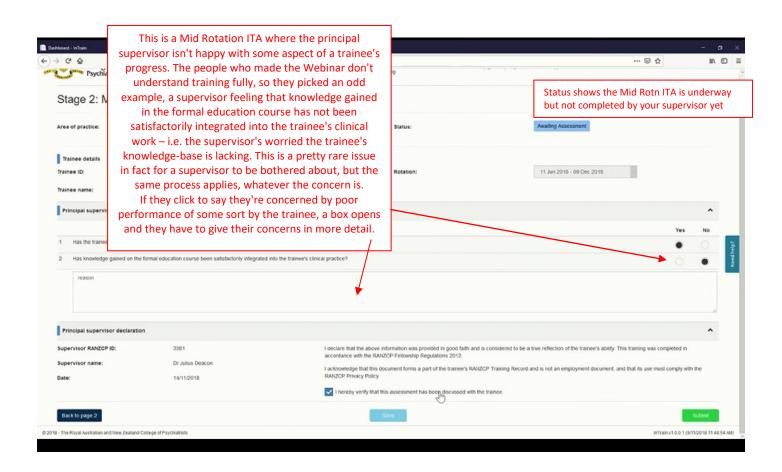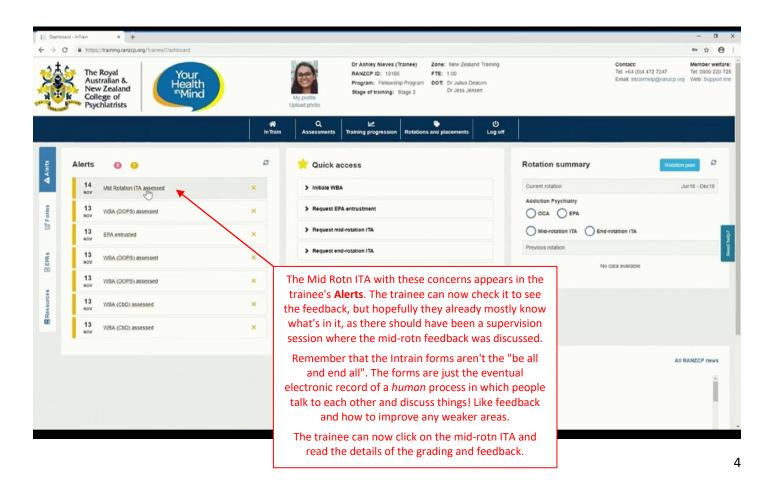
How to do a mid-rotation ITA:

You've clicked on the button to set a mid-rotation ITA in motion – either from the "Forms" tab on left, or from your Quick Access list.

Above, you **click on the current rotation's date-range** from a drop-down list.

Your principal supervisor's name will be below. Click the box to the left to send this form to them.

Your DoT will have set up your data in Intrain with this principal supervisor attached to your rotn. If the supervisor's name is wrong – say your supervisor recently changed or something – email or phone your DoT and ask them to fix that.

This is your Principal Supervisor's Intrain interface

When you start a mid-rotn ITA and send it to your supervisor, it comes up in their **Queue** or to-do list. It will stay there until they get a chance to fill in all the feedback fields (same fields as the paper ITAs) and once they finalise it, Intrain will send it back to you so you can read the feedback.
You then need to sign it off to finalise it – until you do it's not finished and won't appear on any EPAs.
ONLY YOU CAN START THE PROCCESS FOR AN ITA – YOUR SUPERVISOR CAN'T DO THAT.
But they can chivvy you until you do!

In the real world, the process is much more likely to be:

- Your DoT might send you and your supervisor an email reminding you to do the mid-rotn ITA, as it's close to mid-rotation time.
- With your supervisor, you talk about the need to go over it in supervision, maybe set a date to do it next week or similar.
- Meanwhile you do the Intrain form and your supervisor gets it. Your supervisor might fill in the feedback and grading before the planned supervision session, or they might do it at the session, or afterwards.
- At the supervision session you discuss your progress in the rotn and the ITA feedback your supervisor wants to give you, going over their grading on all the domains. They might alter a grade here or there, after discussion. This is also the best time to review your EPA progress and re-read the details of your EPAs, discussing these with your supervisor and planning how to cover any parts you haven't done yet, like maybe the knowledge aspects, or other required WBAs.
- Your supervisor either finalises the ITA in the supervision session with you or they might finish the rest of it later and send it to you afterwards. Once they do finalise it, it will come up in your Alerts list (remember to hit the "refresh" button regularly) and you then need to read it and finalise it with your sign-off.
- Your completed ITA then appears in your DoT's Queue for checking. If it doesn't, your DoT will hassle you to get it completed!

A tip to help your supervisors!
If they're filling in an ITA with you, at base of p.1. they need to hit SAVE to move to p. 2.
On p.2. they hit NEXT, then FINALISE on p. 3.

This is a Mid Rotation ITA where the principal supervisor isn't happy with some aspect of a trainee's progress. The people who made the Webinar don't understand training fully, so they picked an odd example, a supervisor feeling that knowledge gained in the formal education course has not been satisfactorily integrated into the trainee's clinical work – i.e. the supervisor's worried the trainee's knowledge-base is lacking. This is a pretty rare issue in fact for a supervisor to be bothered about, but the same process applies, whatever the concern is.
If they click to say they're concerned by poor performance of some sort by the trainee, a box opens and they have to give their concerns in more detail.

Status shows the Mid Rotn ITA is underway but not completed by your supervisor yet

The Mid Rotn ITA with these concerns appears in the trainee's **Alerts**. The trainee can now check it to see the feedback, but hopefully they already mostly know what's in it, as there should have been a supervision session where the mid-rotn feedback was discussed.

Remember that the Intrain forms aren't the "be all and end all". The forms are just the eventual electronic record of a *human* process in which people talk to each other and discuss things! Like feedback and how to improve any weaker areas.

The trainee can now click on the mid-rotn ITA and read the details of the grading and feedback.

4

Trainee clicks on the mid-rotn ITA in Alerts and gets this pop up, and clicks "here" to review the ITA.

We've skipped through opening out all the grading fields etc. – see the Webinar for more detail about that, but just click on each heading to open the details. This screenshot shows the last page of the mid-rotn ITA. The trainee now needs to give feedback about how the rotation and their supervision is going:

- Yes/No I've done (3 calendar months of) this training rotn at this point
- Yes/No I've had a definite consultant in charge of all my patients
- Yes/No I've had 3hrs clinical and 1hr 1:1 supervision each week when I wasn't on leave/nights (or 1.5 hours clinical supervision weekly for half-timers)
- Yes/No I've been able to observe my supervisor doing clinical work (interviews/family mtgs)
- Yes/No My supervisor has observed me doing the same

Then trainee signs the form at the bottom by clicking the button. You can say you agree with the feedback, or that you disagree. (Being logged in as a college member is all you need so as to "sign" anything in Intrain. The system knows that you're you.)

Once you're happy that what you've entered is correct, hit the lower right green "submit" button.

If you added data but aren't ready to finalise the form, you can hit SAVE and return to the form later.

Once you click "submit" it goes to your DoT so they can review the feedback and your progress.

This is what your DoT sees when the mid-rotn ITA reaches them – again, this is just the last page, but they can open out all the fields and read the feedback. This shows a mid-rotn ITA where the supervisor felt the trainee's progress wasn't adequate, in some area. The trainee might have agreed or not agreed with that feedback, but it's necessary that a **Supportive Plan** now be developed with the trainee, for the second half of the rotn. The DoT organises that the plan's developed - if the issue's simple, the supervisor and trainee may work one out together, or it may require a meeting with the local Training Coordinator or DoT. Then the DoT clicks "add plan" and the written plan's uploaded as an attachment.

If there's no need for a Supportive Plan, your DoT just checks the ITA and that completes the process.

Back at the main trainee Intrain interface, you can see that the mid-rotn ITA is now marked as done.
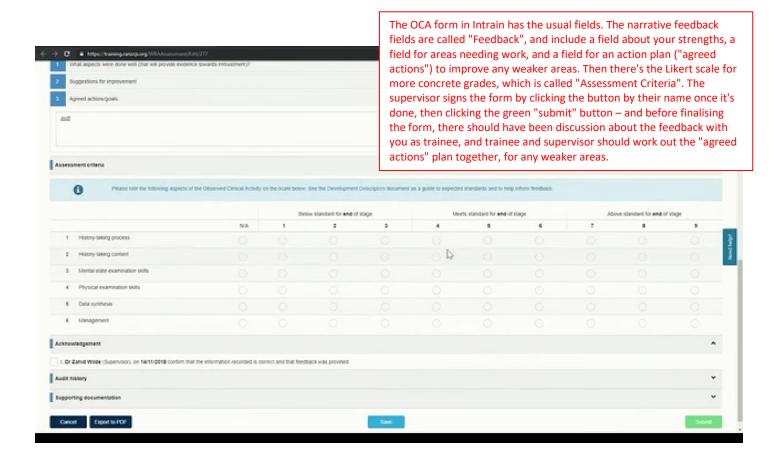
6

So to summarise, the "workflow" for the mid-rotationITA is that the trainee always has to start it off, and it finishes with the DoT. It then stays in the trainee's Intrain record and can be opened and read by the trainee, their current supervisor or their DoT, at any time.
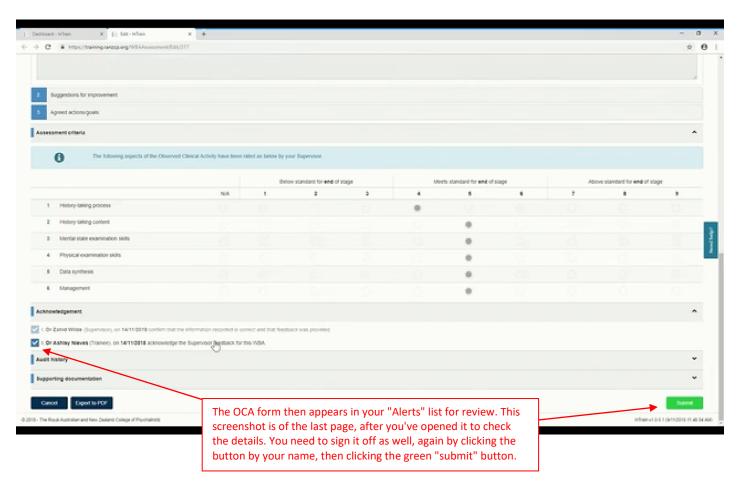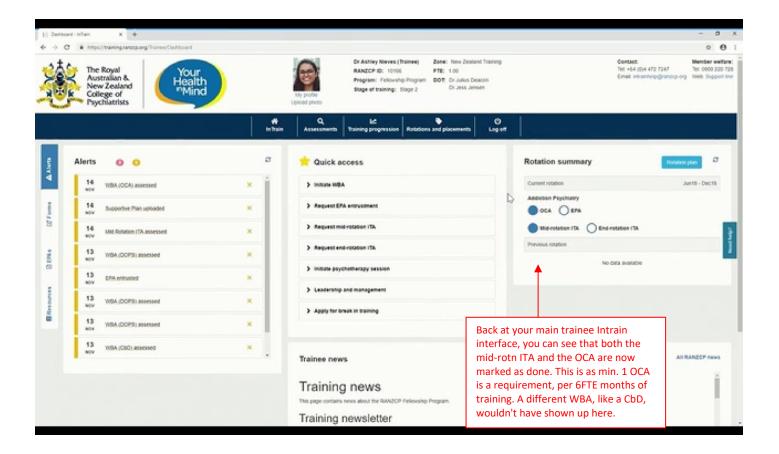

Submit a request for
Mid-Rotation ITA

Assess and provide
feedback

Review feedback

Review feedback and
develop Supportive Plan

Remember this is just a diagram of the electronic form moving through Intrain. As well as this there'd be face-to-face discussions about the feedback in supervision, and if there were any problems with progress, some sort of supportive plan would be developed with the trainee.

How to do a Workplace-Based Assessment (in this case, an OCA) – you start by clicking "initiate a WBA" either from the left-side "Forms" tab, or from your Quick Access list. Then choose the OCA option.
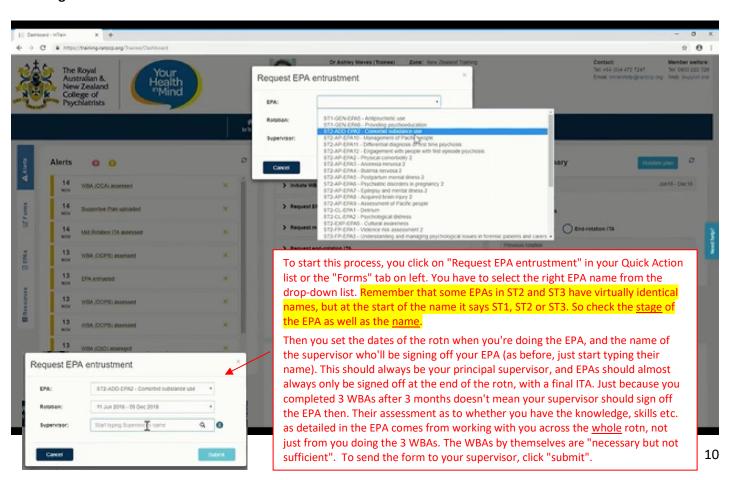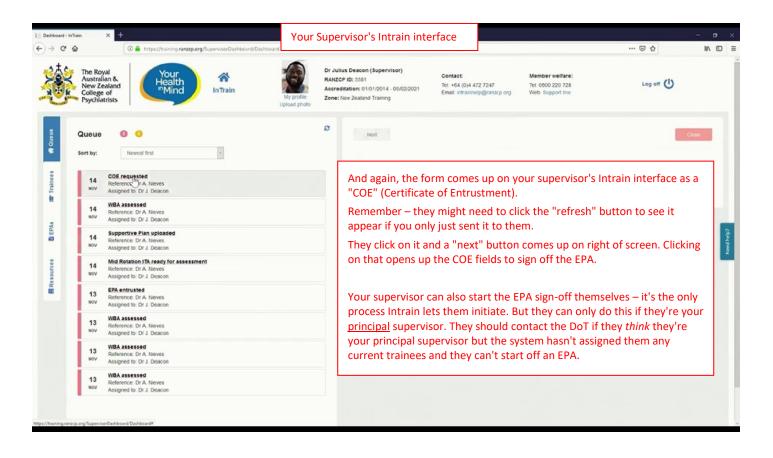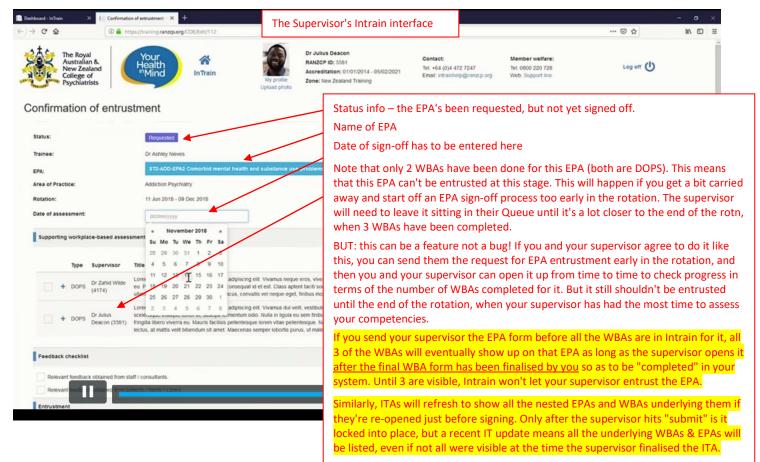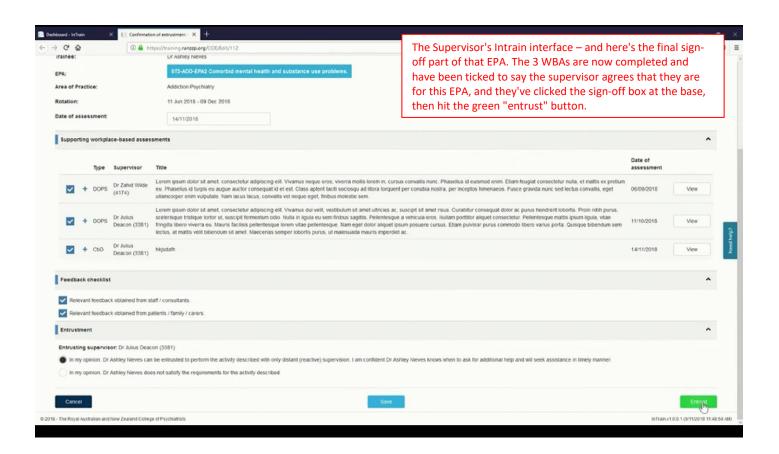
Workplace-based assessment

WBA Type:	Observed Clinical Activity
Status:	Draft
Trainee name:	Dr Ashley Nieves
Rotation:	11 Jun 2018 - 09 Dec 2018
Post:	South Community Mental Health Tear
Supervisor:	wild Dr Zahid Wilde

Please tag the EPA(s) that this WBA will contribute to.

○ This WBA has been undertaken independently from any EPAs

● This WBA will contribute to the evidence base for the following EPAs

× ST2-ADD-EPA1 - Intoxication and withdrawal

Session 1

Date of assessment 1:	14/11/2018
Session duration 1 (minutes):	0

Session 2

Date of assessment 2:	14/11/2018
Session duration 2 (minutes):	0

Brief description of case

Audit history

Supporting documentation

> The current rotation dates and rotation you're in.
>
> Add the name of the supervisor who'll do the WBA with you. Start typing and Intrain will fill the name in. Mostly this will be your principal supervisor, but another supervisor might do some WBAs with you at times. Note that if it isn't your principal supervisor, you need their permission to do a WBA with any other supervisor.
>
> If the other supervisor's name doesn't appear, ask your DoT as it might mean that psychiatrist isn't an accredited local supervisor. You must do the WBA with an accredited local supervisor.
>
> Then add the date you're doing the WBA and the time taken – there are 2 date+time fields as OCAs can be split across 2 sessions. Hopefully if you just do one session Intrain will let you just use the 1st field. If it insists both date fields are used, put the same date and split the time 50:50 between the sessions.

> All WBAs require a "brief description of case". You don't need much detail, just so you and your supervisor can recognise the patient or scenario later (except for OCAs, which have more fields to fill here). In your Assessment list the 1st 6-8 words of your description will be visible, so make the first few words memorable.

> The OCA then appears on the supervisor's Intrain interface. (this is the supervisor doing the WBA with you)
>
> Here's the OCA form ready for them to fill in.
>
> Note that if you're in supervision and sending the OCA form to the supervisor just before doing one, or before discussing the grading etc., the supervisor will need to click the "refresh" button to get the new form to appear.

The OCA form in Intrain has the usual fields. The narrative feedback fields are called "Feedback", and include a field about your strengths, a field for areas needing work, and a field for an action plan ("agreed actions") to improve any weaker areas. Then there's the Likert scale for more concrete grades, which is called "Assessment Criteria". The supervisor signs the form by clicking the button by their name once it's done, then clicking the green "submit" button – and before finalising the form, there should have been discussion about the feedback with you as trainee, and trainee and supervisor should work out the "agreed actions" plan together, for any weaker areas.

The OCA form then appears in your "Alerts" list for review. This screenshot is of the last page, after you've opened it to check the details. You need to sign it off as well, again by clicking the button by your name, then clicking the green "submit" button.

Back at your main trainee Intrain interface, you can see that both the mid-rotn ITA and the OCA are now marked as done. This is as min. 1 OCA is a requirement, per 6FTE months of training. A different WBA, like a CbD, wouldn't have shown up here.

How to get an EPA Entrusted:

To start this process, you click on "Request EPA entrustment" in your Quick Action list or the "Forms" tab on left. You have to select the right EPA name from the drop-down list. Remember that some EPAs in ST2 and ST3 have virtually identical names, but at the start of the name it says ST1, ST2 or ST3. So check the stage of the EPA as well as the name.

Then you set the dates of the rotn when you're doing the EPA, and the name of the supervisor who'll be signing off your EPA (as before, just start typing their name). This should always be your principal supervisor, and EPAs should almost always only be signed off at the end of the rotn, with a final ITA. Just because you completed 3 WBAs after 3 months doesn't mean your supervisor should sign off the EPA then. Their assessment as to whether you have the knowledge, skills etc. as detailed in the EPA comes from working with you across the whole rotn, not just from you doing the 3 WBAs. The WBAs by themselves are "necessary but not sufficient". To send the form to your supervisor, click "submit".

10

And again, the form comes up on your supervisor's Intrain interface as a "COE" (Certificate of Entrustment).

Remember – they might need to click the "refresh" button to see it appear if you only just sent it to them.

They click on it and a "next" button comes up on right of screen. Clicking on that opens up the COE fields to sign off the EPA.

Your supervisor can also start the EPA sign-off themselves – it's the only process Intrain lets them initiate. But they can only do this if they're your principal supervisor. They should contact the DoT if they *think* they're your principal supervisor but the system hasn't assigned them any current trainees and they can't start off an EPA.

The Supervisor's Intrain interface

Status info – the EPA's been requested, but not yet signed off.

Name of EPA

Date of sign-off has to be entered here

Note that only 2 WBAs have been done for this EPA (both are DOPS). This means that this EPA can't be entrusted at this stage. This will happen if you get a bit carried away and start off an EPA sign-off process too early in the rotation. The supervisor will need to leave it sitting in their Queue until it's a lot closer to the end of the rotn, when 3 WBAs have been completed.

BUT: this can be a feature not a bug! If you and your supervisor agree to do it like this, you can send them the request for EPA entrustment early in the rotation, and then you and your supervisor can open it up from time to time to check progress in terms of the number of WBAs completed for it. But it still shouldn't be entrusted until the end of the rotation, when your supervisor has had the most time to assess your competencies.

If you send your supervisor the EPA form before all the WBAs are in Intrain for it, all 3 of the WBAs will eventually show up on that EPA as long as the supervisor opens it after the final WBA form has been finalised by you so as to be "completed" in your system. Until 3 are visible, Intrain won't let your supervisor entrust the EPA.

Similarly, ITAs will refresh to show all the nested EPAs and WBAs underlying them if they're re-opened just before signing. Only after the supervisor hits "submit" is it locked into place, but a recent IT update means all the underlying WBAs & EPAs will be listed, even if not all were visible at the time the supervisor finalised the ITA.

11

The Supervisor's Intrain interface – and here's the final sign-off part of that EPA. The 3 WBAs are now completed and have been ticked to say the supervisor agrees that they are for this EPA, and they've clicked the sign-off box at the base, then hit the green "entrust" button.

The trainee's Intrain interface – now that that EPA's been entrusted

You can see that the EPA requirement is now marked as done. For it to show up here, the EPAs needed for the <u>whole rotation</u> must have been done – so it must have been the second EPA of two, or this must be a half-time trainee if only one EPA was done.

These are all "alerts" telling you something has been done, or sometimes a message from the college about a coming update to Intrain with associated downtime.

Your dashboard will fill up with these so you need to delete them periodically, by clicking on each then hitting the green DISMISS box on the right.

Now for the end-of-rotation ITA process:

Only you, the trainee, can start the process for an end-of-rotation ITA. Just click the option in your Quick Access list or in the Forms tab on the left. Same as for the mid-rotn ITA – put in the rotation dates that the ITA relates to (usually your current rotn, but you could be doing this belatedly at the start of the next rotn, e.g. if you'd been away on leave). Add your principal supervisor's name by starting to type it. Then click "submit" to send it to your principal supervisor.

The end of rotation ITA comes up on your supervisor's Queue.

''They click "next" to start filling it in.

Screenshot 1 (top):

The Royal Australian & New Zealand College of Psychiatrists — Your Health in Mind — InTrain

Dr Julius Deacon
RANZCP ID: 3381
Accreditation: 01/01/2014 - 05/02/2021
Zone: New Zealand Training

Contact:
Tel: +64 (0)4 472 7247
Email: intrainhelp@ranzcp.org

Member welfare:
Tel: 0800 220 728
Web: Support line

My profile
Upload photo

Log off

Stage 2: End of Rotation In-Training Assessment Form

Area of practice: Addiction Psychiatry

Status: Awaiting Assessment

Trainee details

Trainee ID:	10166	Rotation:	11 Jun 2018 - 09 Dec 2018
Trainee name:	Dr Ashley Nieves	Training at (FTE):	1.00
Start date:	11/06/2018	Calculated FTE months:	5.65
End date:	30/11/2018		Calculate FTE months

Rotation details

5.65 — FTE months actually completed.

Entrusted EPAs

ⓘ Number of EPAs entrusted in this rotation: 2

EPAs

ST2-ADD-EPA1 Management of substance intoxication and substance withdrawal.		Dr Zahid Wilde	12/11/2018	2	1
ST2-ADD-EPA2 Comorbid mental health and substance use problems.		Dr Julius Deacon	14/11/2018	1	2

ⓘ Number of...

35:20

Annotation (red box): As this ITA records your accredited time in the rotn there are some crucial details here that aren't on the mid-rotn ITA: start & end dates of the rotation, & the FTE and total time completed there. If you started the rotn really late or ended it really early, so that a small shortfall can't be absorbed into the 6 weeks maximum leave allowance in a rotn, the time may be less than 6 months. If you're a half-timer the time would be 3 months. If you'd had a lot of sick leave, only 4 months of the rotn might be able to be credited, etc. This kind of unusual rotn timing should be discussed with your DoT who will advise what to put in these date and time fields. Plus, the ITA eventually goes to the DoT to check, and they can edit the dates or total time to make sure it's correct.

Screenshot 2 (bottom):

End date: 09/12/2018

Calculate FTE months

Supervisor assessment

Please indicate (by selecting the relevant grade) which statements most appropriately describes the trainee's performance for each Learning Outcome. The columns marked with * should help inform the feedback provided to the trainee i.e. trainee's strengths and weaknesses.

MEDICAL EXPERT

	Unable to comment	Rarely met*	Inconsistently met*	Almost always met	Sometimes exceeded	Consistently exceeded*
ASSESSMENT: Conducts a comprehensive psychiatric assessment with an emphasis on development of advanced interviewing skills.	○	○	○	●	○	○
DIAGNOSIS: Uses a detailed understanding of the diagnostic system to provide a justification for diagnosis and differential diagnosis, and applies these to a variety of clinical settings and patient groups.	○	○	○	●	○	○
FORMULATION: Generates a broad formulation incorporating relevant theoretical constructs to inform a management plan, and applies these to a variety of clinical settings and patient groups.	○	○	○	●	○	○
MANAGEMENT: Constructs and implements tailored management plans, with supervision, using evidence-based biological and psychosocial approaches, developing expertise in psychopharmacology and psychotherapeutic skills.	○	○	○	●	○	○
PSYCHIATRIC EMERGENCIES: Undertakes the assessment and initial management of psychiatric emergencies in specialty patient groups and a variety of settings.	○	○	○	○	○	○
LEGISLATION: Undertakes designated tasks under the mental health legislation and other applicable legislation (Guardianship, Advance Directives, Forensic mental health, legislation relevant to other aspects of mental health and health care service provision) under supervision.						
REFLECTION: Engages in critical reflection and self-monitoring during clinical practice, integrating and translating new knowledge and skills into changes in clinical practice.						
REPORT WRITING: Understands the principles of report writing and legal terms with regards to relevant legislation.						

COMMUNICATOR
COLLABORATOR
MANAGER
HEALTH ADVOCATE

37:01 51:14

Annotation (red box): Then your supervisor can work their way through the CANMEDS competency areas, doing all the grades, as well as the strengths and "areas needing work" feedback fields.

They'd either do this with you in supervision, or discuss it with you in supervision and enter the data into Intrain later when they get time.

14

The final part of the ITA that your supervisor does is just like the paper version, with 5 grading options – 3 pass grades and 2 fail grades. Then they sign it with a click, hit the green "submit" button and it comes back to you again.

The ITA appears in your Alerts list again. You can open it up and check the grading and feedback. The "status" is now "assessed by supervisor".
There's a summary of the no. of EPAs and OCAs done in the rotation at the base, and which WBAs were done for each EPA.

Here are some more of those "workflow" diagrams –
The end of rotation ITA process:

The EPA entrustment process – 2 ways it can be done:

The WBA process (OCAs, CbDs, Mini-CEXs, PPs, DOPS):

Some more information about what's in your "Forms" tab:

All the usual forms can be done on-line – or they *will* be here, after a while. They're not all loaded up quite yet (filled star = loaded, white star takes you to the old pdf form on college forms page).

If you click on a filled star, that form will be added to your Quick Access list. Another click removes it from that list.

Down below are links to the Trainee Newsletters, and other training updates.

Looking at the top row of options now: Assessments, Progression, and Rotations.

At the top of the **Assessments** page, there's a scrolling list of all your WBAs, EPAs and ITAs. In the "search" field you can narrow it down – e.g. just search for the ITAs.

If there's no icon of a pen in a box at the right, it's just a list of things you did before Intrain. You can't open those up and see the actual form. But the pen icon indicates an electronic form done in Intrain. You can click on that and open the OCA or the ITA etc, and read the feedback.

Below the scrolling list are the major college exams and assessments, and below that, other training requirements, like the 3 psychotherapy cases of Stage 3.

Browser page — training.ranzcp.org/Trainee/TrainingProgression

The Royal Australian & New Zealand College of Psychiatrists | Your Health in Mind

Dr Ashley Nieves (Trainee) RANZCP ID: 10166 Program: Fellowship Program Stage of training: Stage 2
Zone: New Zealand Training FTE: 1.00 DOT: Dr Julius Deacon / Dr Jess Jensen
Contact: Tel: +64 (0)4 472 7247 Email: intrainhelp@ranzcp.org Member welfare: Tel: 0800 220 728 Web: Support line

Nav: In Train | Assessments | Training progression | Rotations and placements | Log off

Download training record (pdf)

Training and assessment progression

All training time reflected below is calculated at the FTE.

Stage 1 | Stage 2 | Stage 3

Mandatory Area of Practice (12 months)

Child and Adolescent Psychiatry — 6.04m

Elective Area of Practice (12 months)

Addiction Psychiatry — 5.95m
Forensic Psychiatry — 4.82m

Entrustments

Intoxication and withdrawal	ST2-ADO-EPA1
Comorbid substance use	ST2-ADO-EPA2
Treatment-refractory psychiatric disorders	ST2-AP-EPA1
Manage an adolescent	ST2-CAP-EPA1
Prepubertal child	ST2-CAP-EPA2
Delirium	ST2-CL-EPA1
Psychological distress	ST2-CL-EPA2
Electroconvulsive therapy (ECT)	ST2-EXP-EPA1

Annotation:

This page is from clicking the **Trainee Progression** button.

The blue button lets you download your training record as a pdf, very similar to the current trainee record. It may not be accessible quite yet – I think they're fixing the reports system. But you should hopefully still be able to access your database record via myRANZCP.

Below, all the rotations you've done and the EPAs you've done/started in each Stage open out if you click on the Stage title.

Annotation:

And below that on the **Progression** page is a diagram of your training trajectory and deadlines for the major assessments and other progression triggers. If it's greyed out, that means the assessment is completed. It's a little hard to follow, but for example if you're in Targeted Learning after 2 misses of an exam, the whole row for that exam will be gold-coloured, indicating TL. If it's white, you're not in TL – but you'll know that, anyway.

Breaks in training

Reason	Start date	End date	
Other	11/07/2014	11/01/2016	
Other	12/01/2016	06/06/2016	

Progression triggers

Total FTE months accumulated: **28.81**

	Eligibility months	Number of attempts	Targeted learning	Show cause trigger
MCQ Exam	6	1	36 months or 2 attempts	48 months or 3 attempts
Essay-style Exam	18	0	60 months or 2 attempts	72 months or 3 attempts
Psychotherapy Written Case	0	1	60 months or 2 attempts	72 months or 3 attempts
Scholarly Project	0	0	60 months or 2 attempts	72 months or 3 attempts
OSCE	30	0	60 months or 2 attempts	72 months or 3 attempts

	Accrued	Show cause trigger
Break in training (months)	22.88	60
Not in training (months)	0	12
Program duration (years)	5	13
Rotation fails	0	3
Total Stage 2 FTE months	10.86	36

Legend: Show cause | Targeted learning | Completed

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The **Rotations and Placements** button gets you this. First, a list of your allocated rotations through training. You can open each of them out to see more details. Below, "placements" is similar list, but it's the fixed details about any rotation, like the rotn's FTE and mailing address.

If this information is wrong – e.g. the wrong rotation is listed – let your DoT know as it's important to have this data correct in the system.

ALL COLLEGE TRAINEES ACROSS NZ AND AUSTRALIA ARE NOW USING THE INTRAIN SYSTEM

There are still a few training forms that aren't in Intrain – mostly administrative ones like for part-time training, and exam-related forms. Look for the form you want inside Intrain and if clicking on the name directs you to the old college "forms page" for a pdf form, that means it's not in Intrain yet so print it and after completing/signing your part, scan it to your DoT.

Most of the specific forms for the Advanced Certificates are *not* in Intrain – not sure if/when that will change. Use the old pdf versions from the page for that Certificate, and give or scan them to your supervisor and DOAT for sign-off in the usual paper-based way. e.g. the psychotherapy forms for the Adult Certificate – get the pdf form from the Adult Certificate page and use that. The college staff will enter it into your Intrain once they receive it.

Transitional rules from the old to new systems:

"Off-line" forms

Old "paper" (scanned pdf) WBAs you've saved to carry over into current training and use toward an EPA you'll complete now are called off-line forms, or off-line WBAs. There's a process in Intrain to upload the scanned form, attached to the relevant EPA. College staff then check it and soon after it shows in your Assessments list and will appear on the relevant EPA. Your supervisor can open and read it within Intrain.

Psychotherapy Case (PWC) Case Discussion forms:

1. If you collected <u>any</u> of them BEFORE Intrain came in so they're on paper, you must do ALL THREE on paper and enclose them with your final Case submission.
2. If you only started doing these since Intrain started, then they must ALL be done within Intrain. That means that your PWC supervisor must be accredited and have login access to Intrain. If they aren't, get your DoT to sort that out. There's an info handout about using Intrain for supervisors who just supervise PWC cases here: http://www.psychtraining.org/Intrain-Handout-for-Psychotherapy-Supervisors.pdf

Using draft paper versions of the forms for WBAs

In the real clinical environment it'll be rare that your supervisor will be able to fill in grades and feedback on the relevant WBA form electronically on the spot. Mostly a clinical setting won't allow, or be safe for that. Instead, there are simple draft paper forms on the front page of the Auckland training website www.psychtraining.org that any trainee can use. The suggested "real" process for a WBA is thus:

1. Trainee sends their supervisor the relevant WBA form within Intrain.
2. Trainee prints off the relevant draft form and gives it to the supervisor just before starting the WBA. Don't rely on the supervisor remembering to print one off themselves – it's your training, so make sure they have one!
3. Supervisor jots draft notes, feedback and grades on it during the WBA.
4. Either then or soon after, the verbal feedback session happens, and the grades, narrative feedback fields and "action plan" are finalised.
5. Supervisor then uses the draft form to complete the form within Intrain.

Draft ITA forms can also be printed off by your supervisor to do preliminary notes and grades before meeting with you to discuss your mid- or end-of-rotation ITA.

EPAs are a simple electronic sign-off form so no paper version is needed, as there's no feedback or grading.

WBAs done by non-accredited supervisors – like team psychologists for the Stage 2 psychotherapy EPAs:

Team psychologists doing a WBA with you have to use a draft paper form as above (that you'll print off for them). Then you give that paper form to your principal supervisor who'll have to enter the data into Intrain and sign it off. You can't upload a form done by a non-accredited supervisor as an "off-line" form – college staff would reject it.

NB: As above, psychologist/psychotherapist supervisors for the PWC (the long psychotherapy case) whether Hospital-based or in private are accredited and have a college number now, so they can do the PWC Case Discussion forms with you directly in Intrain. Just open Intrain on a tablet/Pad or their computer while with them in their office and they'll be able to log in and complete the form. Note that all such PWC supervisors now have to be accredited via your DoT so if their name doesn't come up as a supervisor when you try to send them a Case Discussion form in Intrain, you need to get your DoT to sort that out.

Workflows to get the eventual form right, with the underlying forms visible in it: (SV=supervisor, Tr=trainee)

For an EPA (all this is done in Intrain):

SV completes WBA form → Tr gets form on their dash & finalises it →
SV completes WBA form → Tr gets form on their dash & finalises it →   **SV signs off (entrusts) the EPA in Intrain**
SV completes WBA form → Tr gets form on their dash & finalises it →   (all 3 WBAs show - SV can't sign it off until all 3 are there)

For an ITA (all this is done in Intrain):

SV completes the EPAs needed to pass the rotation, as above (2 for full-timers, 1 for a rotn less than 6 FTE months)

SV makes sure there's at least 1 OCA showing on page 1 of the ITA – can't pass the rotation without it
(but half-timers just need 1 per 6 FTE months of training)

SV then completes the rest of the ITA

NB: this means a SV can't do a last WBA/OCA with you then all at once finish that WBA form, the last EPA and the ITA in one Intrain session. *Not unless you're there with them*, as after they complete the WBA(s), you have to finalise them, before the linked EPA or ITA can be completed. Getting this wrong can mean an OCA done *after* the ITA was completed isn't on the eventual ITA form, which is a hassle and can need college staff intervention to fix.