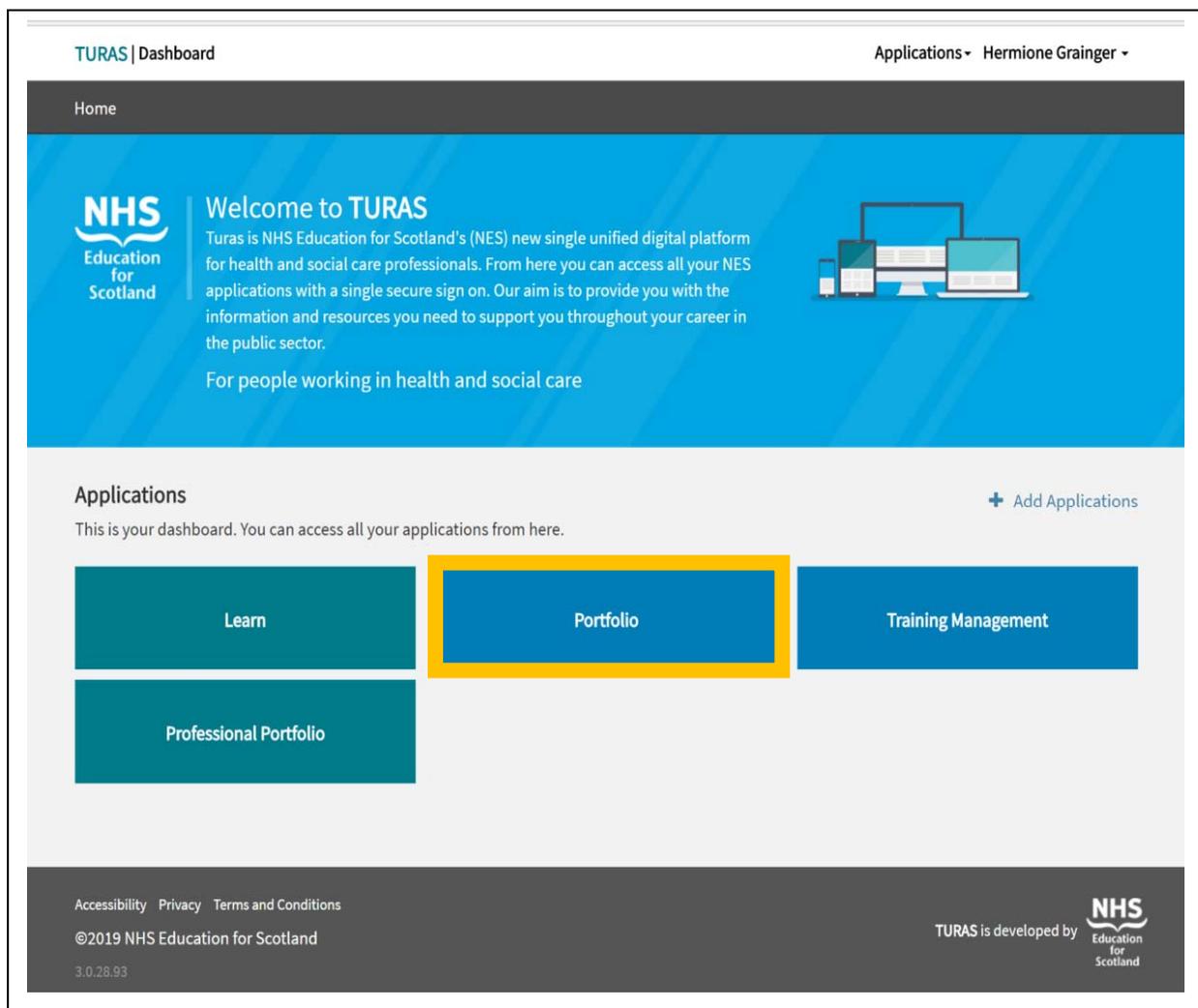![nesdigital logo]

TRAINEES
HOW TO CREATE A TEAM ASSESSMENT OF BEHAVIOUR (TAB) FORM AND GENERATE TICKETS

Step 1

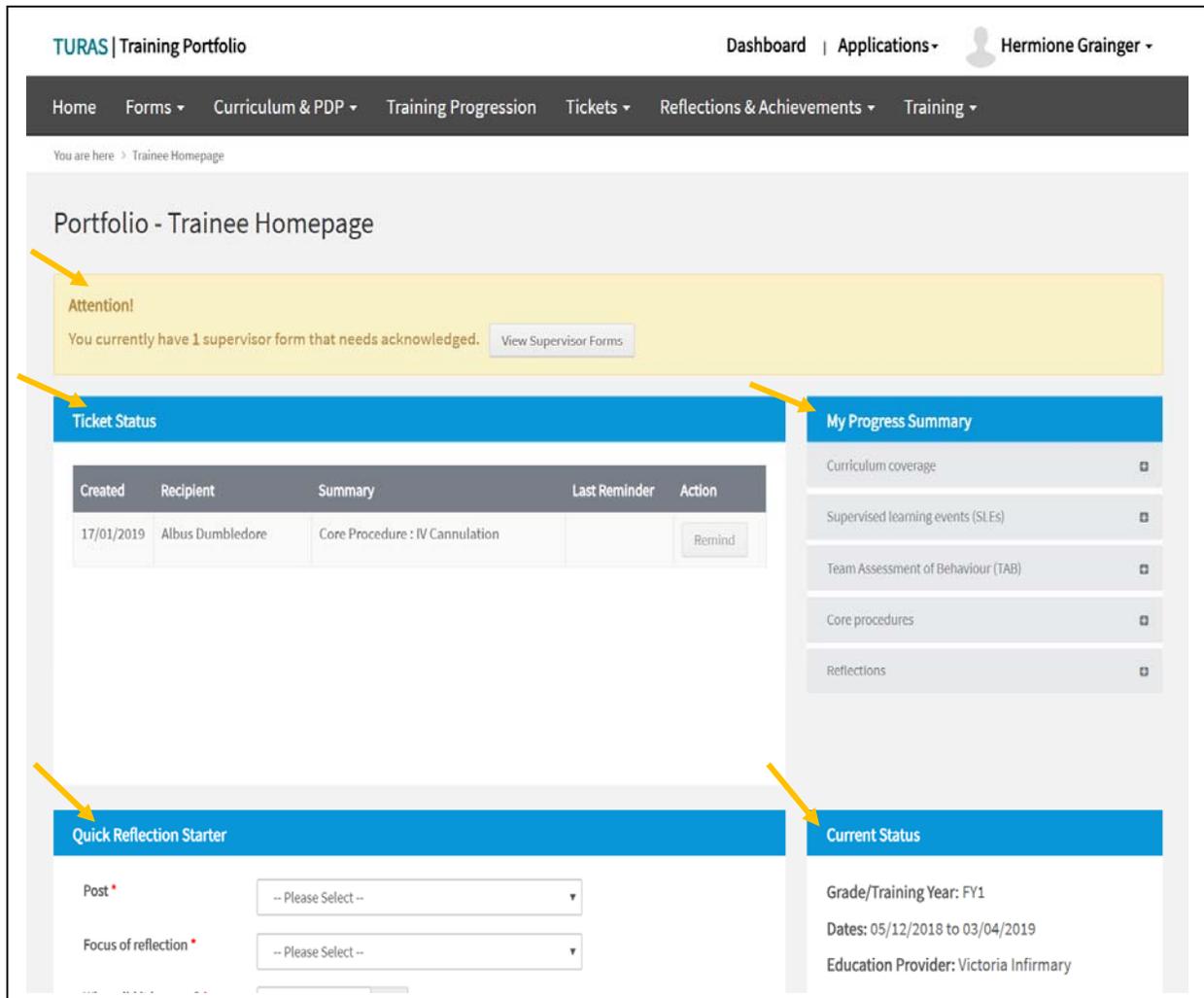**Once logged into Turas, select the Portfolio application from your Turas Dashboard**

Step 2

You will be taken to your Portfolio - Trainee Homepage.

Here you will be able to access:

- **forms you may need to acknowledge**
- **view your ticket status**
- **view my progress summary. Click on the + beside each area to open up to view your progress at a glance**
- **start a quick reflection**
- **view current status this section includes your current grade/training level, post start/end date, location (Education Provider), specialty, your named Educational and Clinical Supervisor and Programme Director. To contact any of the named trainers, click on the name and will open your email browser.**

If you find that any of this information is incorrect you need to contact the relevant Foundation School.

Step 3

To access all Forms, click Forms from the tool bar to open the drop-down list. Here you will see the standard forms you can add to your portfolio. For this example click Team Assessment of Behaviour (TAB).
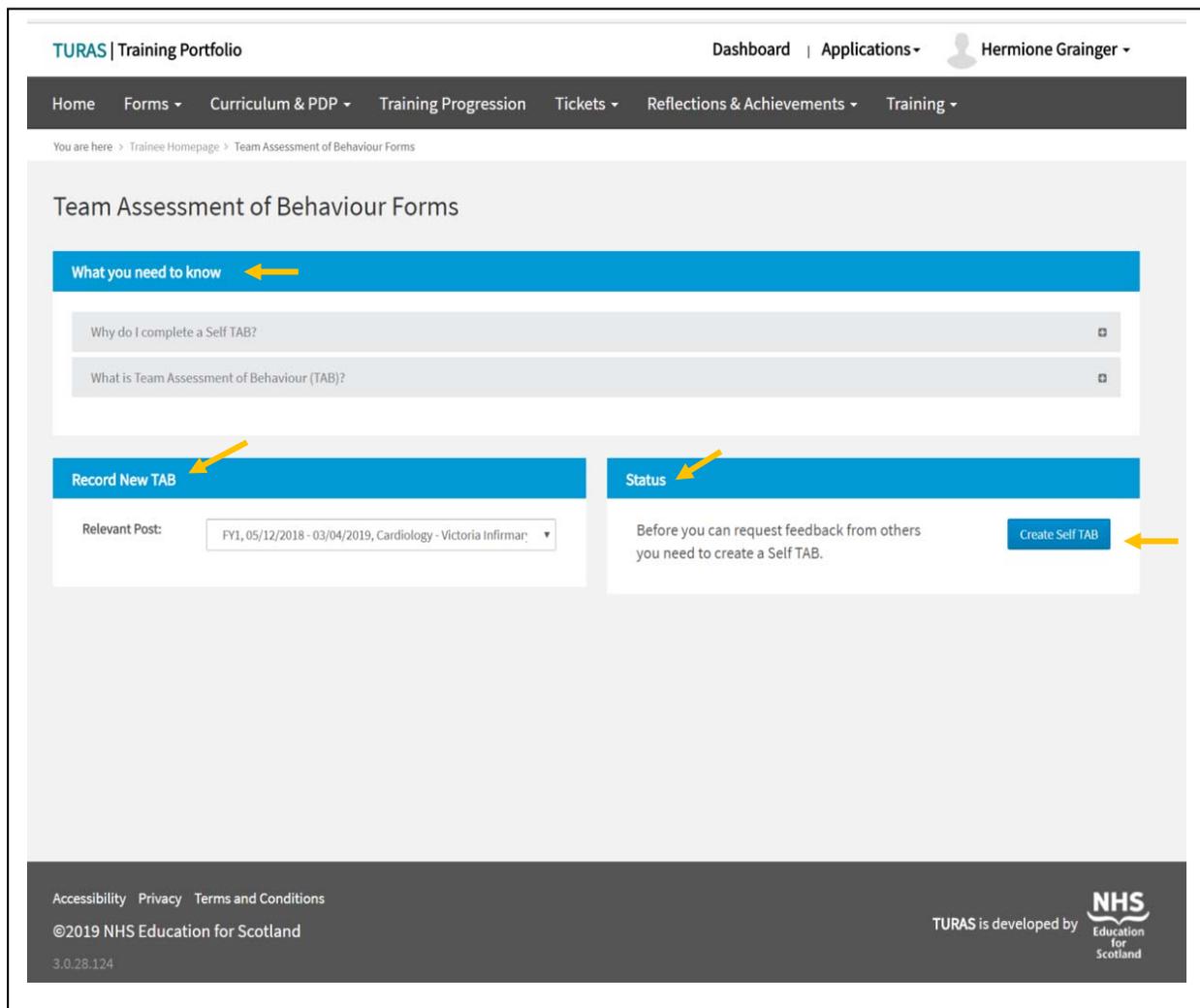
Step 4

Once you have click on TAB from the drop-down you will open the Team Assessment of Behaviour Forms. The What you need to know section provides you with descriptors, Why do I complete a Self Tab and What is a Team Assessment of Behaviour (TAB)? To access these, click on the +.

In the section headed Record a New TAB select from the drop-down list of the post you wish the TAB to be recorded against.

In the Status section you will note that before you can request feedback from others you need to create a Self TAB.

Click Create Self TAB.

Step 5

Once you have clicked Self TAB a new window opens called Create Form complete the form and as soon as you are happy with the contents click Save and the bottom on the form it should be noted that you go back and update your Self TAB from the main TAB window.

Please note if you select you have some concern or you have major concern you must add on a text into the comments box.

Step 6

Once you've selected to submit the form you'll be directed back to the **Team Assessment of Behaviour Forms Screen.** In the section headed Multi-disciplinary Team you will see a table showing the mix of assessor types as well as the minimum number required under each category.

Remember that the Summary TAB will only be released once 10 TABs have been completed and your supervisor considers that you have the correct mix of assessor types.

In the Action column click Create Ticket against the assessor category you wish to send the TAB too.

Step 7

You will be taken to Create Ticket window.
1. **Select post from the drop-down you are requesting the assessor to complete the TAB against**
2. **Click Next**
3. **Select the Recipient you wish to complete the TAB from radio button**
4. **Click Next**
5. **Add any comments or message you wish the be displayed to the recipient**
6. **Click submit**
7. **You will be asked if you are sure**
8. **Click submit**

Step 8

When you have clicked Submit you are taken to the Create Ticket - Confirmation Screen where you will see the details of the email which has been sent to the recipient. Click Return at the bottom on the page to return to the Team Assessment of Behaviour Forms.

Create Ticket - Confirmation

Ticket Details

The following email has been sent to ndptest9@nes.scot.nhs.uk

Ticket Email

Dear Albus Dumbledore

FEEDBACK HAS BEEN REQUESTED FOR

Trainee: Hermione Grainger (ndptest8@nes.scot.nhs.uk)
Post: FY1, 05/12/2018 - 03/04/2019, Cardiology - Victoria Infirmary - Hogwarts Foundation Programme 06 - FY1 (WOS2237)

HOW TO PROVIDE FEEDBACK

Please login to the Turas Portfolio home page at https://nesndpportfoliouat.azurewebsites.net/ using your Turas Account to review and complete this request.

If you do not already have a Turas Account please contact your local Turas Administrator to arrange this.

DETAILS OF THE REQUEST

Team Assessment of Behaviour (TAB) (Consultants/GP Principals (including clinical / educational supervisor))
Assessor: Albus Dumbledore
Trainee Comment: test, please complete
Trainee Email: ndptest8@nes.scot.nhs.uk

Thank you for taking the time to complete this request.

Regards
The Turas Portfolio Team

Step 9

When you have clicked Return you are taken back to the Team Assessment of Behaviour Forms where you can repeat to process for each assessor category.

To review the Tickets, you have sent. Select Tickets from the menu to open the drop-down list and select Created. You will see a what you need to know section, click on the+ to open the information and click – to close.

The table displays show the created tickets as well as the Form(s) Status. The Actions column allows you the view the details sent to the assessor or delete the Ticket.

If the Form Status is Complete you will only be able to view Ticket details and not the information the assessor has submitted.

If the ticket is Incomplete you can view details or Delete the ticket created.