



GUIDE FOR CLINICIANS AND STUDENTS

User Guide

Clinical logging, CPD, reflective practice, personal audit and portfolio exports, all in one place.

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Need help? Email support@clinicalauditcompass.co.uk and we'll aim to respond within 24 to 48 hours. You can view a sample export at clinicalauditcompass.co.uk/sample-export.

1. Getting Started

Register by downloading the app from the App Store or Google Play, selecting 'Sign Up', and entering your email. Your email is verified with a One Time Passcode (OTP). You then create a password with confirmation, and can add your picture, personal information, profession and professional registration number.

New accounts begin with a 7-day free trial. After this, an active subscription is needed for continued full access. You can choose a monthly or annual plan, paid through the App Store, Google Play, or by card via Stripe.

Data can be captured offline. It syncs automatically once you're back online, so it is securely backed up and included in your exports.

2. Edit Profile & Settings

Update your profile with year of birth, location, professional registration number, and password.

Your specialty or professional role label can be edited at any time. As your career progresses, for example moving from Trainee to Qualified, or into a Lead role, you can update it yourself, and it will display correctly on all your future exports without any manual workaround.

Subscriptions can be managed in 'My Subscriptions'.

If you change professional role, this is not a problem. You can add more than one profession under the registered account email, so professional mapping and exports stay accurate. Each profession's logs are kept fully separate, and only one profession can be included per export to maintain clarity and governance integrity.

Revalidation Profile

A dedicated Revalidation Profile section is available within your profile. Completing this once means your key professional information automatically populates your Revalidation Export, saving you time at every export.

Clinical Audit Compass tailors the Revalidation Profile to your selected regulatory body. When you choose your regulator, the app shows only the fields that regulator requires, keeping the form relevant and uncluttered. Core fields are always shown; regulator-specific fields appear based on your selection.

Core fields (all regulators)

- Professional regulator
- Professional registration number
- Area of clinical practice
- Scope of practice
- Current professional role or job title
- Summary of professional work
- Personal professional statement
- Revalidation cycle start date
- Next revalidation date (optional)

Regulator-specific fields

Depending on the regulator you select, additional fields appear automatically:

- **GMC:** patient feedback, colleague feedback, significant events, patient and colleague feedback dates, and probity and health declaration with date.
- **NMC:** practice hours, indemnity provider, indemnity policy reference, reflective discussions, and health and character declaration with date.
- **GPhC and GOSc:** personal development plan (PDP).
- **HCPC, GDC, GOC and GCC:** core CPD, reflective and practice evidence fields auto-populate from your logged activity; no additional manual fields are required.

Why this matters: Each UK regulator has different revalidation requirements. By showing only the fields relevant to your regulator, Clinical Audit Compass makes sure your Revalidation Export matches the format your regulator expects, and that you only complete what you actually need to.

Appraisal Profile

An Appraisal Profile section lets you pre-populate information commonly required during professional appraisal or development reviews. This automatically populates your Appraisal Export. Fields include:

- Current professional role
- Organisation or employer
- Clinical specialty or area of work
- Professional objectives for the appraisal period
- Professional development goals
- Appraisal discussion summary
- Supervisor or reviewer name (optional)

Advanced Practice Setting

Within the Appraisal Profile section you will also find an Advanced Practice toggle. This setting is intended for Advanced Clinical Practitioners, Advanced Nurse Practitioners, Advanced Paramedic Practitioners, and other advanced practice roles. Your existing profession profile is used automatically, so no additional information is required.

COMING SOON The Advanced Practice export capability is in active development. When released, enabling this setting will add a Four Pillars evidence section to your Appraisal Export automatically, and make a standalone Advanced Practice Four Pillars Export available in your export menu. The toggle is available now so your profile is ready when the feature goes live.

3. Logging Clinical Activity

Select 'Add Clinical Log' to record cases, environment, presentation, skills, medications, decisions, and outcomes. Tags can be used to link clinical logs and CPD entries together.

NO PATIENT-IDENTIFIABLE DATA MUST BE ENTERED AT ANY POINT.

Referred To and Admitted To

When logging a clinical case, if a referral or admission was made you can document this within the outcome section of the log.

- **Referred To:** select the service or specialty the patient was referred to (for example Emergency Department, Cardiology, Mental Health or Crisis Team).
- **Admitted To:** select the specialty or ward the patient was admitted to (for example Medical, Surgical, Paediatrics).

These fields only appear when a referral or admission outcome is selected, keeping the logging form clean and relevant to each case. This structured approach supports governance, audit, and downstream reporting.

Medications: Administering and Prescribing

When logging medications within a clinical log, you record each medication given or prescribed during the clinical encounter. The medication section is structured to accurately reflect your clinical role and scope of practice.

Administered or Prescribed

For each medication you can indicate whether it was:

- **Administered:** you gave the medication to the patient.
- **Prescribed:** you prescribed the medication for the patient.

This distinction is important for accurate governance documentation, particularly for clinicians with independent or supplementary prescribing authority.

Prescribed by Senior

A 'Prescribed by Senior' checkbox is available within the medication logging section. This lets you indicate when a medication was prescribed by another authorised clinician and you administered it under their direction. This is particularly relevant for nurses, paramedics, allied health professionals, and students.

When 'Prescribed by Senior' is selected, the medication is recorded as administered under direction. When it is not selected, the medication is assumed to have been independently prescribed or administered within your own scope of practice.

Why this matters: *Accurately documenting whether you prescribed or administered under direction makes sure your clinical records correctly reflect your scope of practice and professional accountability. This protects you medico-legally and strengthens the governance value of your portfolio evidence.*

Confirming and Anonymising Your Log

Before a clinical log can be submitted, you must tick a confirmation box: *"I confirm this log contains no patient-identifiable information."* The Submit button stays inactive until this is ticked. This is a deliberate safeguard that keeps the platform free of patient-identifiable data and supports its information governance position.

A second, optional checkbox is also available: *"Enhanced Anonymisation Required."* Tick this only for sensitive or unusual cases where the combination of details could increase the risk of identifying an individual, for example a rare presentation, a patient from a very small community, or a case personally known to you. Tap the information icon beside it for examples.

What Enhanced Anonymisation does: *when you tick this box, the entry is automatically reduced on export to protect against identification. The Environment, Age Range, Presentation and Outcome fields are redacted, and the date is reduced to month and year only. Your interventions, medications and the log title remain visible, because they record what you did and learned rather than who the patient was, and they do not identify a patient on their own. You do not need to do anything further at export time; if you ticked the box when logging, the reduction is applied for you.*

4. CPD

Select 'Add CPD Entry' to log teaching, learning, courses, and informal development. Tags can be used to link clinical logs and CPD entries together.

5. Reflection

Add reflections using Gibbs, Driscoll, Rolfe, ERA, Johns, or Free Text (1,000 characters per section). Reflections can be linked to clinical logs or CPD entries and will always appear as a dedicated section within your exported portfolios.

6. Personal Audit Cycle

The Personal Audit Cycle module lets you structure and evidence quality improvement activity relating to your own individual practice, using a clear 4-stage governance framework: Plan, Measure, Improve, Re-measure. This is a personal reflective and CPD tool for your own portfolio. It is not designed to record or manage organisational, team, or departmental audits.

Creating a New Audit

1. Select 'Personal Audit Cycle' from the main menu
2. Select 'Create Audit'
3. Enter an Audit Title and a description outlining aims and objectives
4. Review the 4-stage audit framework: Plan, Measure, Improve, Re-measure
5. Select 'Create Audit' to set up the audit

Once created, the audit will appear in 'My Audit' under the Active tab.

Completing Audit Stages

Select the audit from the Active list to open the Audit Stage Details screen. Each stage can be expanded and documented individually. You can add planning notes, upload supporting documents, record findings and actions, and progress through each stage in turn.

Progress is displayed within the My Audit section, for example Stage 2 of 4, 50% Complete.

Marking an Audit as Complete

An audit cycle is not considered formally complete until you select 'Mark as Completed'. This action confirms that:

- All relevant stages have been reviewed and finalised
- Findings and actions have been appropriately documented
- Re-measurement (where applicable) has been completed

Once marked as completed, the audit moves from the Active tab to the Completed tab, is recognised as a closed audit cycle, and can be included in portfolio exports as evidence of structured quality improvement.

Only select 'Mark as Completed' once you are satisfied that the full audit process has been undertaken and documented appropriately.

7. My Logs and My CPD

This is where you will find records of all your logs and CPD entries, which you can view, edit and delete.

8. Exporting Data

Clinical Audit Compass provides structured export options so you can generate professional portfolio documents and data files from your logged activity. Exports are filtered by date range and profession.

Clean clinical display: *in every PDF export, clinical log items appear by their item name only (for example, 'IV Access (Peripheral)') rather than with their underlying category prefix. The full category is retained internally for analytics and grouping, but your exported portfolio reads cleanly and professionally.*

Selecting Your Regulator

For the Revalidation Export, your regulatory body is taken directly from your Revalidation Profile. The regulator shown on the export screen reflects your profile setting and cannot be changed there. To change your regulatory body, update it in your profile settings. This makes sure the regulator-specific fields you have completed always match the export you generate.

PDF Display Format

When generating a PDF export you can choose how your clinical log entries are displayed:

- **List:** entries displayed individually in a stacked portrait format.
- **Table:** entries displayed in a structured landscape table with all fields as column headers (recommended for professional submissions).

Your reflections will always appear as a dedicated section within every PDF export, whichever display format you choose. Clinical log and CPD data tables automatically switch to landscape orientation for maximum readability.

Export Types

Main Portfolio Export

A comprehensive professional portfolio summarising all your logged activity across the selected date range. It includes clinical logs, CPD, reflections, and audit cycles with embedded analytics. Every PDF export opens with a consistent branded front cover showing your name, profession, reporting period, and export type.

See a sample Main Portfolio Export, generated from fictional data, at clinicalauditcompass.co.uk/sample-export.

CSV Data Export

A CSV spreadsheet file (opens in Excel or Numbers) containing all your raw logged data. Suitable for personal analysis, research, institutional reporting, or university placement review.

Regulatory Revalidation Export

A structured report aligned with your professional regulator's requirements, for HCPC, NMC, GMC, GDC, GPhC, GOsC, GOC, or GCC. The export presents your CPD evidence, reflective practice, clinical activity, and quality improvement activity in a format suitable for regulatory revalidation submission, with regulator-specific sections and a standards or requirements compliance check appropriate to your regulator.

Appraisal Export with KSF Mapping

COMING SOON This export is in active development. When released, it will automatically map your logged clinical activity to the NHS Knowledge and Skills Framework (KSF). Each KSF dimension section will present evidence counts, supporting clinical activity, and reflective evidence drawn from your logs. If you have enabled the Advanced Practice setting, it will also include an additional Four Pillars evidence section presenting your activity against the NHS Advanced Practice Four Pillars framework: Clinical Practice, Leadership and Management, Education, and Research.

Advanced Practice Four Pillars Export

COMING SOON This standalone export is in active development. When released, and with the Advanced Practice setting enabled in your profile, it will map all your logged activity exclusively to the NHS Advanced Practice Four Pillars framework, generating a dedicated advanced practice portfolio document.

What Every PDF Export Includes

- **Branded front cover page:** name, profession, export type, reporting period
- **Clinical log data:** portrait list or landscape table format
- **CPD log summary:** landscape table
- **Reflections:** dedicated portrait section, always included
- Audit and quality improvement activity

Enhanced Anonymisation in Exports

Any entry you marked with Enhanced Anonymisation when logging is automatically reduced in every export: the Environment, Age Range, Presentation and Outcome are redacted and the date is shown as month and year only, while interventions, medications and the log title are retained. This happens automatically, so no further action is needed at export time. See 'Confirming and Anonymising Your Log' in Section 3 for full details.

9. About Us, Privacy Policy and Terms and Conditions

These can all be found on the main screen for reference.

10. Logout and Security

You can log out at any time through the main menu. For security reasons, you may be automatically logged out after 7 days, at which point you will be prompted to log back in.

For additional protection, the app automatically locks after 3 minutes of inactivity. To reopen it, authenticate using Face ID, Touch ID, or your password. This auto-lock can be turned off in the settings if not required.

11. Data Protection

Clinical Audit Compass Ltd is registered with the Information Commissioner's Office (ICO) and complies with UK data protection requirements.

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