THE ePORTFOLIO FOR GP SPECIALTY TRAINING

A GUIDE FOR TRAINERS/Clinical Supervisors

PLUS ADDITIONAL FUNCTIONALITY FOR EDUCATIONAL SUPERVISORS

UPDATED FOR NOVEMBER 2014
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**INTRODUCTION**

This Manual is designed to explain the use of the ePortfolio for Trainers/Clinical Supervisors* and Educational Supervisors.

The first part is a guide to ePortfolio functionality for Trainers and Educational Supervisors, with references to some differences for Educational Supervisors. Included in this are notes on differences between the Trainer Role and the Educational Supervisor Role. These differences are typically marked with the following icon:

The second section focuses on functions that are specific to the Educational Supervisor role, as well as tasks they will need to undertake. Educational Supervisors should therefore pay particular attention to this section.

* Thoughout this manual, the term Trainer is used to denote both Trainers (in GP setting) and Clinical Supervisors (in hospital setting)
Section I: The ePortfolio

Login and Home Page

This manual gives an introduction to Educational Supervisors/Trainers on how to use the functions within ePortfolio. You will have been provided with a username and password and these should be entered into the login screen shown below: https://gpeportfolio.rcgp.org.uk

If you have forgotten your password, please use the third Forgotten Password option labelled ‘If you are a deanery user’ which allows you to enter an email address to retrieve a password. Please note, this function will only work if the email address has been provided in the profile in ePortfolio.

If an email address has not been provided in your ePortfolio account, then please contact the ePortfolio Helpdesk on 020 3188 7655 or tep@rcgp.org.uk

Once you have logged into ePortfolio, you will be on the home page which is entitled ‘Welcome Dr ...’.

In the next few pages we will look into personal details and messaging through ePortfolio.
The Personal Details section contains information such as address, email, phone number and login details. To access this information select ‘Personal Details’ on the left toolbar (Section shown below).

As an Educational Supervisor/Trainer, you will be able to update information shown in the Personal Details page.

Changes to your password are made here.
**MESSAGING SYSTEM**

The Messages section allows you to exchange messages with other ePortfolio users for easy communication. Contacts are listed by Person, Area or Role.

The toolbar on the left will show if there are any new messages in your inbox. Clicking on this link will take you to the messaging interface. It defaults to the inbox, click on the ‘compose’ tab to start a new message.

**INBOX (RECEIVING MESSAGES)**

When a new message has been received in the inbox, an email will also be sent to your email address. The email that you receive will inform you only that you have received a new message in the messaging system.

The messages that you receive are only available in plaintext format. You are not able to send attachments using the messaging system.

Once you have read the email you can choose whether to reply, delete, or close the current message that you are viewing.
You can send messages to all other users of the ePortfolio system within your Deanery.

**TERMS AND CONDITIONS**

Users must take the same care in drafting a message as they would for any other communication. In line with current national NHS guidelines, confidential information including patient identifiable information should not be sent using the ePortfolio messaging system. Messages of an offensive nature can be traced to the originator and action will be taken against the perpetrator. Serious deliberate breach of the messaging policy may be regarded as gross misconduct and as such dealt with under the RCGP disciplinary policy and procedures and/or through legal action.

Click on ‘Compose’ to start a message. To select recipients, click on ‘select’ next to the ‘To’ box, or click directly on the ‘To’ field. This will bring up the contacts search box.

Type in all or some of the name for person you wish to address the message to in the ‘find’ box and click ‘search’. There are filters for ‘roles’ and ‘ST Year’ which allow you to narrow or focus your search. The ‘Hospital’ field will auto complete based upon locations for your area.

When the recipient’s name is shown, tick the box next to it and click ‘select’. Repeat the process to add more recipients. It is also possible to add multiple recipients at once by ticking next to the relevant names.

To remove a recipient: click on the relevant field to get the contacts box, search for the recipient to be removed, untick the box next to their name, click ‘select’.

If you wish to send a copy to one or multiple recipients but do not wish to disclose their details in the header of the message, click on ‘select’ next to the ‘BCC’ box and add them as recipients in this field.

You will now be able to start composing your message. Enter the subject of the message and the body of the text. You have the option to ‘send’, ‘discard’ the message or ‘Save as Draft’.
**DRAFTS**

Saved messages are shown here for the user to edit/send them later.

Clicking on the message will take you back to a compose screen so you can edit and send it. You can delete items directly out of the drafts screen as well, by ticking the box next to it and clicking 'Delete'.

**SENT**

Sent messages are stored here for reference.
To switch from your role of Trainer to another Role, follow the steps below.

1. Locate the ‘Switch Roles’ section in the left hand menu.
2. Select the role you wish to switch to by clicking with the mouse.
3. The screen will refresh with your new role assigned. You will then need to reselect the trainee you wish to see.

**Trainee Related Activities**

The trainee activities relate to functions the Educational Supervisor/Trainer needs to complete for each individual trainee. Depending on your relationship with the Trainee within the ePortfolio, you will be able to perform different functions.

**Switching Roles**

It is possible that you will have more than one role within the ePortfolio. When you first log in to the site you will be asked to choose/confirm the role that you are logging in for. If you have more than one role you will see the following ‘Switch Role’ option in the left hand menu.
Selecting Trainees

Trainees linked to you will show on the welcome page. To select a trainee click on their name and their dashboard will be displayed. Click on ‘Summary’ for an overview of the contents of the trainee’s eportfolio. Click on ‘home’ above ‘personal details’ at any time to return to the welcome page.

This side bar will always show your currently selected trainee.

NB Trainers can only view a trainee’s declarations. Educational Supervisors countersign the Educational Agreement once the trainee has signed it.
You are also able to see which Declarations your trainee has signed in previous posts.

<table>
<thead>
<tr>
<th>Declaration</th>
<th>Signed By</th>
<th>Signed</th>
<th>Countersigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity Professional Obligations</td>
<td>Trainee</td>
<td>06/06/2013 10:31</td>
<td>Not required</td>
</tr>
<tr>
<td>Health Professional Obligations</td>
<td>Trainee</td>
<td>06/06/2013 10:34</td>
<td>Not required</td>
</tr>
<tr>
<td>Educational Agreement</td>
<td>Trainee</td>
<td>06/06/2013 10:34</td>
<td>27/06/2013 17:06</td>
</tr>
</tbody>
</table>

Clicking on Historical Declarations will allow you to see them.

<table>
<thead>
<tr>
<th>Declarations signed prior to August 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ST1/Market Street Health Group/General Practice/Full Time --- 04/02/2009 - 04/08/2009</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>Educational Agreement</td>
</tr>
<tr>
<td>Health Regulatory and voluntary proceedings</td>
</tr>
<tr>
<td>Health Professional Obligations</td>
</tr>
</tbody>
</table>

Historical Declarations can't be edited in any way, they are just for reference.
Learning Log

Functions Available
- Read/Lock a Shared Log Entry
- Comment on Log Entries
- Validate Log Entry Against a Professional Competence

A trainee can decide whether they wish to share a log entry. If they have decided to share the entry, the log will be displayed in this section. There may also be attachments connected to the log entry.

The number of unread logs you have for a particular trainee will also be shown on the trainee’s dashboard.

Users can specify how many Logs are displayed per page (10/15/20/25) using the drop down option.
**Navigate the Learning Log**

The Learning Log has several tools to help you navigate it. By default it shows only the most recent entries. However you can change what is viewed here.

1. By selecting on a Learning Log Type from the drop down and clicking ‘search’, you can filter to display only those entries.

![Image of filters and search]

2. If you have selected this, clicking on ‘All’ will take you back to viewing all the Logs.
3. You can also switch between each page by the numbered links at the top and bottom of the table.

![Page numbers and links]

4. Finally you can click on any of the headings to sort by that column type.
To read a shared log entry, follow the steps below:

1. Click on ‘Learning Log’ on the left hand menu.
2. You can choose whether you wish to see all the logs or just specific logs; for example, only Clinical Encounters.
3. When you have found the entry you wish to view, click the title next to the entry.
4. The log will open up to display the contents of the log.
5. You can then mark the entry as read by clicking on ‘Mark as Read/Lock’ at the top of the screen.
6. The entry will then be marked as read and prevent further editing by the Trainee.
**Comment on Log Entries**

Once you have read a log entry, you may wish to make a comment. The trainee will be able to see this comment and may also wish to reply.

1. Click on ‘Learning Log’ on the left hand menu.
2. You can choose whether you wish to see all the logs or just specific logs; for example, only Clinical Encounters.
3. When you have found the entry you wish to view, click the title next to the entry.

3. Click on ‘New Comment’ at the bottom of the screen.

4. Enter the comment and then click “Save”. You can also view and update previous comments you have made and view comments made by the trainee and other Trainers.
**VALIDATE EVIDENCE IN LEARNING LOG ENTRY**

In validating evidence, the Supervisor is confirming that the evidence is of good enough quality for others to use in making assessments of performance, i.e. that it relates to the chosen competency area and shows meaningful reflection. Validation does not imply that competence has been achieved. This function can also be used to add/amend Curriculum Statement Headings for Learning Log entries up until an entry has been marked as read.

1. Click on ‘Learning Log’ on the left hand menu.
2. You can choose whether you wish to see all the logs or just specific logs; for example, only Clinical Encounters.
3. When you have found the entry you wish to view, click the title next to the entry.
4. Click on ‘Validate evidence’.

5. Tick to add a professional competence and then ‘Save’. You can also remove any current selections.
6. If you wish to amend the curriculum statement links, these can be found under the ‘Select Descriptors’ tab.

The curriculum statement headings map to ‘curriculum coverage’ and professional competences map to the ‘Competence Areas’ in the reviews and can be viewed in summary tables via the respective links in the left hand menu.

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**The curriculum statement headings were updated August 2012**

- Any Learning Logs created before the update will maintain their association with the previous curriculum statement headings.
- Learning Logs created or edited after the update will only be linkable to the new curriculum statement headings (if the entry had previous curriculum statement headings chosen, they will be removed and displayed to the user for reference purposes only in order to provide a guideline for selecting from the updated values).
- The curriculum statement headings summary table (counting log entries) will appear twice where a Trainee has validated logs against both versions.
The personal development plan contains objectives that trainees have set themselves and that have been agreed at review time which will be relevant to their continuing professional development. They can assign timescales to their objectives and mark them as achieved once completed.

It is possible to toggle between viewing ‘all’ entries, those ‘marked as ‘achieved’ and those that are still ‘active’ using the display above the table.

As a trainer, the personal development plan section is only available to you for viewing.
In this section, the evidence that is collected by each of the WPBA tools is shown. As a trainer or clinical supervisor you can fill in new submissions for some of the assessments. These include:

- MSF
- miniCEX
- DOPS
- CbD
- COT
- PSQ
- CSR (Clinical Supervisor Only)

Details of the posts (past, present and future) for each trainee can also be seen under ‘Posts’. Assessments relating to each post can be viewed separately clicking the ‘view’ link.
Here you can view information on your trainee’s current assessments. There are two columns; the completed column shows the total number of assessments that have been submitted and the minimum column shows the minimum number that should be completed before the review based upon a full time training schedule.

The information listed gives a summary of the number of assessments that the trainee has to complete or has completed in preparation for their next review. The 2 drop-down boxes let you select the review types. First you select ST year. Then you can select the review number. The Review numbers that appear will depend on the number of reviews created for the trainee in that ST year. Additionally there will always be a option labeled “(Not Created)” in this menu. This covers review periods where evidence will be required but the review has not yet been created. For more information on creating reviews, please see page 22.

The ‘Minimum’ column title is also a link to the minimum evidence requirements page of the RCGP Curriculum Website.

You will currently be in summary mode. To have a more detailed look into each of the assessments, select by clicking on the name of the assessment (circled above). Each of the assessment screens will have similar layouts. For demonstration purposes we will use the DOPS information for this trainee.

Please note, to view the correct review period summary a review date must be set. Please see the review date section on page 23.
COMPLETE NEW SUBMISSIONS

As a trainer you can complete new submissions for miniCEX, DOPS, CbD, COT and CSR. We will continue using DOPS as an example.

1. Click on DOPS as circled above
2. Click on the ‘Fill’
3. A blank form will open up allowing you to complete the assessment information.
4. Click ‘Submit’ once completed.
This section allows for trainers, clinical supervisors, educational supervisors and Deanery/LETB assessment leads/administrators to enter comments in the trainee’s ePortfolio. This could include a note about interim meetings that don’t fit easily anywhere else or additional information you feel is important that you can’t enter anywhere else. Each entry will be date stamped, with the name of the person who entered it and a subject field. Trainees will be able to view everything that is entered in this section, but will only be able to respond to it through their learning log. It will also be available to the ARCP Panels.

To add a new note, click on ‘Add New’, enter a Subject and the details. Once completed, press ‘Save’. It will appear in the list, along with a timestamp and the Name and Title of the person making the entry.
The ‘Review Preparation’ section allows you to review a trainee’s coverage of the curriculum and their progress against professional competences in a given review period.

Only Educational Supervisors and Administrators can create new reviews. The following section will pertain only to Educational Supervisors. Notes for Trainers/ Clinical Supervisors will follow this section.

<table>
<thead>
<tr>
<th>End Of Review Period</th>
<th>Review Type</th>
<th>Outcome</th>
<th>Self Rating Complete</th>
<th>Is Accepted By Trainee</th>
<th>Edit</th>
<th>View</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/10/2014</td>
<td>ST1-1</td>
<td>Satisfactory progress</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>01/04/2015</td>
<td>ST1-2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Add New Review »</td>
</tr>
</tbody>
</table>
RECORD NEW REVIEW

The evidence collected in the ePortfolio is reviewed at six monthly intervals by the Educational Supervisor. For the current post, you will need to set an appointment for the review, making sure you specify the correct ST year. Once the review is completed, you will need to complete the information in the form.

1. Click on ‘Review Preparation’ on the left hand menu bar and then ‘Add New Review’. NB You can’t create or edit a review until the Educational Agreement has been countersigned.
2. The Setup page will appear as below.

![Add / Edit Review](image)

This section is required in order to set the end of review date and location for the trainee review. This is completed before the review takes place. The date will default to 6 months from the last review date. You will just need to ensure you select the correct ST year for the review.

Click ‘Save’.

After the review has taken place you will need to return to this entry, complete all sections and provide a recommendation. Information on how to re-open the entry is shown on the next page.
The ‘end of review period’ review dates determine where evidence and the competence self-rating form is seen for the trainee. Setting them correctly is therefore very important. The following section covers each part of the review individually.

The End of the Review Period date should be selected as the final day of the 6 month review period. This will allow all the trainee evidence and the competence self-rating to be submitted for the correct review. If for some reason, your trainee has last minute evidence to submit and will not have it in on time, you can change this review date to a date after they will have submitted the last item. You can see the date and type of the last review above this.

Initially, the review does not have to be completed in full - only the date and type of the review need to be saved and the review can be edited later when the actual review meeting takes place.

Note: Each stage of the review has a ‘Save’ function at the bottom of the screen allowing you to return and add to/edit each section at your convenience, as opposed to completing the review in one sitting.
Once the Review creation process has been completed, you can comment on each of the areas covered by the review. All of them are important so you need to complete all sections.

It is possible to navigate to a specific section using the links to complete each section of the review in any order. Use the ‘continue’ button and this will allow you to navigate to the next section as long as all the boxes have had entries made.

The comments entered will be seen by both the trainee and the ARCP panel.

### Curriculum Coverage Comments

- How has the curriculum coverage developed since the last review?
- Please comment on the curriculum coverage in relation to the stage of training and current post.
- On which areas of the curriculum does the trainee now need to focus their attention before their next review?

The first area that you get the option to comment on is the Curriculum Coverage of the trainee. Through their learning log, the trainee should be showing they are covering the curriculum. This is your opportunity to comment on how they are doing, and identify areas for improvement.

### Skills Log Comments

- Given the trainee's current level of experience, please comment on their coverage of the mandatory skills.
- On which skills does the trainee now need to focus their attention before their next review?

The next section allows you to comment directly on the trainee's Skills Log. This is how you keep track of their DOPS coverage. The trainee needs to have completed the 8 Mandatory DOPS by the end of their training. You can note how they are progressing and advise the trainee what areas to work on.

### Review of PDP

- Please comment on the quality of the PDP.
- Please comment on the progress made towards agreed objectives.
- Which objectives remain outstanding?

Next are the PDP comments - You can note how they are progressing and advise the trainee what areas to work on.
The next sections are the Competence Areas comments from the Trainee’s self-rating and the Competence Areas comments section for the Educational Supervisor.

Here you need to comment on the quality of the evidence presented in the ePortfolio and how well the examples demonstrate each of the professional competence areas along with suggested actions. (Up to 5 of these actions comments can be linked to the agreed learning plan section on the final page of the review, copying the text). You should look though the linked learning log entries and the Evidence Section and comment on the formal assessments and where the Trainee can improve in all of these areas. It is also possible to link additional evidence to support your rating.

The final section provides a summary of your comments - you can return to the relevant stage to edit them as necessary - and here you can comment on the overall quality of the evidence presented for the review. You can also outline an agreed learning plan for the next review (a minimum of three, which will copy in to the trainee’s PDP).

An additional mandatory question has been inserted at the end of the ESR to record details of any concerns or investigations for Revalidation purposes.

Next you will make an overall recommendation with comments and identify areas for further development outlining the learning plan you have worked out with your trainee. You have the choice of 4 recommendations:

- **Satisfactory**: if you are happy with their outcome.
- **Unsatisfactory**: if they have not met their requirements or are falling short in some way.
- **Panel opinion requested**: if you need the opinion of the panel for this trainee.
- **Out of Post**: when you are completing a mandatory review for a trainee not currently in training. They may be on maternity leave for example, but still require 6-monthly reviews.
Completing the Review

Near the bottom of the screen there is an option ‘Do you believe this to be the trainee’s final review?’ Choosing ‘yes’ provides further options to record achievement of OOH and CPR/AED requirements. These should only be looked at for the FINAL REVIEW. This screen gives you the option to mark CPR/AED as achieved. This will appear ticked or unticked across all reviews, so you may see this ticked for a review other than the final review. If the trainee has achieved these requirements, these boxes should be left.

All trainees are required to have a number of Out of Hours (OOH) sessions to complete their training. These are done in their ST3 year, but may be supplemented in ST1 or ST2 on a pro-rata basis. You should check with your Deanery on the specifics of your trainee’s requirements. For the Final Review only, you should check that your trainee has met these and you are satisfied with them. If you are, then you can tick this and it will mark OOH as complete for the trainee. It is possible your trainee will not have quite completed these by the time of their Final Review. If this is the case, you can still mark this off, but only if you have agreed with them that they will complete their requirement. If they still have OOH to complete, you should ensure they enter these as future Learning Log entries.

Both of these are required for the final ARCP signoff by your Deanery, so it is important that for the Final Review these are ticked off.

The dates at the bottom of the screen allow you to enter the dates since the last review and the present review date.

Finally you have the save options, there are two choices. “Save” saves the review, and you can go back in and edit it whenever you need to.

There is also a “Complete & Submit” option. When you click on this, you are signing off this review as complete. This will send a message to the trainee that they have a review pending for them to accept. They will allow them to read this review and countersign it. Once they have accepted the review it can no longer be edited.
AMEND A REVIEW

To amend or review existing review dates, follow the instructions below.

1. Click on ‘Review Preparation’ on the left hand menu bar.

2. Click on the edit icon next to the review you wish to view or amend to go to the ‘setup’ or ‘finish review’ page.

3. The form will be displayed where you can view or amend the information about the review.

4. You may navigate directly to the relevant section you wish to update in the review by selecting the relevant tab. Please note the ‘final review’ page cannot be accessed until all the previous sections have been completed, including the trainee’s self-rating of the competence areas.

Please note, if you have accidentally duplicated a review date then please amend it to the approximate date of the next review. This can be amended later to put in the exact date.
The review process has these main sections:

- Curriculum coverage
- Review of skills log
- Review of PDP
- Assessment against the professional competence areas

Before embarking on a review you will need to check any shared log entries that a trainee has requested you to validate; they will only appear here if they have been ‘shared’ by the trainee. The curriculum coverage section allows you to see how many log entries the trainee has completed and linked to each of the curriculum statement headings.

Click on ‘Curriculum Coverage’ on the left hand menu bar and the following table will be displayed.

<table>
<thead>
<tr>
<th>Curriculum Statement Headings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>2.01 The GP Consultation in Practice</td>
</tr>
<tr>
<td>2.02 Patient Safety and Quality of Care</td>
</tr>
<tr>
<td>2.03 The GP in the Wider Professional Environment</td>
</tr>
<tr>
<td>2.04 Enhancing Professional Knowledge</td>
</tr>
<tr>
<td>3.01 Healthy People promoting health and preventing disease</td>
</tr>
<tr>
<td>3.02 Genes in Primary Care</td>
</tr>
<tr>
<td>3.03 Care of Acutely Ill People</td>
</tr>
<tr>
<td>3.04 Care of Children and Young People</td>
</tr>
<tr>
<td>3.05 Care of Older Adults</td>
</tr>
<tr>
<td>3.06 Women’s Health</td>
</tr>
<tr>
<td>3.07 Men’s Health</td>
</tr>
<tr>
<td>3.08 Sexual Health</td>
</tr>
<tr>
<td>3.09 End of Life Care</td>
</tr>
<tr>
<td>3.10 Care of People with Mental Health Problems</td>
</tr>
<tr>
<td>3.11 Care of People with Intellectual Disability</td>
</tr>
<tr>
<td>3.12 Cardiovascular Health</td>
</tr>
<tr>
<td>3.13 Digestive Health</td>
</tr>
<tr>
<td>3.14 Care of People Who Misuse Drugs and Alcohol</td>
</tr>
<tr>
<td>3.15 Care of People with ENT, Oral and Facial Problems</td>
</tr>
<tr>
<td>3.16 Care of People with Eye Problems</td>
</tr>
<tr>
<td>3.17 Care of People with Musculoskeletal Problems</td>
</tr>
<tr>
<td>3.18 Care of People with Neurological Problems</td>
</tr>
<tr>
<td>3.19 Respiratory Health</td>
</tr>
<tr>
<td>3.20 Care of People with Musculoskeletal Problems</td>
</tr>
<tr>
<td>3.21 Care of People with Skin Problems</td>
</tr>
</tbody>
</table>

Please note - Any Learning logs linked to the previous version of the curriculum can be viewed by clicking on the link ‘Expand Curriculum Statement Headings 2010’ located below the table.
The table shows you each of the curriculum statement headings and how many logs are linked to the headings, grouped by review period, ST year and Total. To look at each of the section logs in more detail, click on the number; the window will refresh to show only the linked logs.

Click on the tile of the log entry to review and validate. For more information on the shared entries, please see pages 13 to 17.
SKILLS LOG

The skills log page shows a summary of the DOPS assessments completed. As a trainer you can view this as needed and see the results for the trainee. Click on ‘Skills Log’ on the left hand menu.

The ‘DOPS Present’ column shows the number of DOPS submitted for that skill. If you wish to view the assessment in more detail, click on the number. This will take you to a list of DOPS submitted.

The Rating and Comments are the trainee’s self-rating against those skills. They will rate themselves and add comments.

The trainee skills are split into three sections: Mandatory, Optional and Other (previously foundation). These will need to be checked prior to the review to make sure that necessary skills have a rating.

The Skills Log rating is a trainee self assessment and is not affected by submitted DOPS.

PDP

The Personal Development Plan page displays a summary of learning objectives for the trainee including any proposed action plan, timescales and expected results. The review process provides the opportunity to record comments relating to the quality of the PDP and how the trainee has progressed with their objectives.
In a review, the ‘Competence Areas - Trainee’ section displays the rating and comments the trainee has submitted. This must have been completed and submitted by the trainee before the review can be submitted for sign off.

### Competence Areas - Trainee

Trainers are asked to self-rate against the 12 professional competence areas. Exploring the self-rating is a useful starting point for the review discussion. In preparing for their educational review, trainees should rate their progression across the twelve areas of competence with reference to the evidence in their Portfolio – this will both aid their reflection skills and also allow educational supervisors to base their comments on the evidence offered.

#### Relationship

The doctor’s ability to understand and develop human relationships principally with patients, families, colleagues and teams.

<table>
<thead>
<tr>
<th>Competence Area</th>
<th>Rating</th>
<th>Dated</th>
<th>Evidence</th>
<th>Actions</th>
<th>No Of Tagged Evidence</th>
<th>Edit</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication and Consultation Skills</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Practicing holistically</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Working with colleagues and in teams</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

#### Diagnostics

The doctor’s ability to gather and use information to make decisions, particularly within a clinical context.

<table>
<thead>
<tr>
<th>Competence Area</th>
<th>Rating</th>
<th>Dated</th>
<th>Evidence</th>
<th>Actions</th>
<th>No Of Tagged Evidence</th>
<th>Edit</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data gathering and Interpretation</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Making a diagnostic decision</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

These will need to be checked and discussed before the review is completed to ensure that you have all the gathered information.
Assessment Against the Professional Competence Areas - Educational Supervisor Feedback

This section shows you a summary of all logs and assessments that relate to each competence area.

<table>
<thead>
<tr>
<th>Competence</th>
<th>Linked Learning Logs In Current Review</th>
<th>Linked Learning Logs In Current ST year</th>
<th>Linked Learning Logs Total</th>
<th>Linked Forms In Current Review</th>
<th>Linked Forms In Current ST year</th>
<th>Linked Forms Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Communication and consultation skills</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>3</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>2 Practising holistically</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>6</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>3 Data gathering and interpretation</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>4 Making a diagnosis/decision</td>
<td>1</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>11</td>
</tr>
<tr>
<td>5 Clinical management</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>6 Managing medical complexity</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>7 Primary care admin and IMT</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>8 Working with colleagues and teams</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>9 Community orientation</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>10 Maintaining performance, learning and teaching</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>11 Maintaining an ethical approach</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>12 Fitness to practise</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

Then select a competence area to review by clicking on a number - evidence is sorted by logs and forms and then by review period, ST year and Total. A new screen will display the trainee’s entries. This gives you easy access to all the required information prior to completing the review.
This section shows the educational supervisors’ ratings and comments for the trainee. This is available to trainers to view only. The trainee will be required to self-assess before the educational supervisor records their comments and ratings. For instructions on recording competences please see page 44.

<table>
<thead>
<tr>
<th>Assessment Against the Professional Competence Areas - Record Competences</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Relationship</strong></td>
</tr>
<tr>
<td>Competence Area</td>
</tr>
<tr>
<td>Communication and consultation skills</td>
</tr>
<tr>
<td>Practising holistically</td>
</tr>
<tr>
<td>Working with colleagues and in teams</td>
</tr>
<tr>
<td><strong>Diagnostics</strong></td>
</tr>
<tr>
<td>Competence Area</td>
</tr>
<tr>
<td>Data gathering and interpretation</td>
</tr>
<tr>
<td>Making a diagnosis/decisions</td>
</tr>
<tr>
<td>Clinical management</td>
</tr>
<tr>
<td>Managing medical complexity</td>
</tr>
<tr>
<td><strong>Management</strong></td>
</tr>
<tr>
<td>Competence Area</td>
</tr>
<tr>
<td>Primary care admin and diet</td>
</tr>
<tr>
<td>Community orientation</td>
</tr>
<tr>
<td>Maintaining performance, learning and teaching</td>
</tr>
<tr>
<td><strong>Professionalism</strong></td>
</tr>
<tr>
<td>Competence Area</td>
</tr>
<tr>
<td>Maintaining an ethical approach</td>
</tr>
<tr>
<td>Fitness to practice</td>
</tr>
</tbody>
</table>
TRAINER REVIEW FUNCTIONS

Trainers are able to view the Trainee’s review, but are not able to make amendments to it. This gives trainers slightly different options.

Clicking on review preparation on the side menu takes you to a similar screen as Educational Supervisors, but you will only be able to view reviews not edit them.

Clicking on a ‘View’ takes you to the same summary screen as an Educational Supervisor, but you will only ever have a ‘read only’ option.
This section is an information source for your curriculum documents and competence areas outlined for the Workplace Based Assessments.

To view the items, click on the title to open.

Curriculum Views

Click on the title of the curriculum to see items

- Being a General Practitioner
- Curriculum Statement Headings
- Curriculum Statement Headings 2010
- Professional Competence Areas
- Guidance for Indicators of Potential Underperformance (IPUs)
Download

Functions Available

- Download copies of trainee information and assessments for your own records

The Download section allows you to download sections of your Trainees’ ePortfolio. All pages within the ePortfolio can be printed off individually and there is a Printer Friendly Version link at the top right of each page that gives you a version of the page without the sidebar. However, the aim of the Download section is to provide options to export some of the bigger items for your own records for CPD and appraisal purposes.

When you click on the Downloads link you are presented with a list of trainees that you have supervised.

Clicking on the ‘Details’ link will give you a list of sections to export:

- Trainee Details and Posts - Trainee Name and GMC numbers along with all the posts that they have undertaken
- Learning Logs – You will get a list of learning logs you have commented on. You will be able to export each one individually, with all comments.
- ARCP Outcomes – A list of all ARCP Panel outcomes for the Trainee. If the ARCP is complete and the trainee has accepted it, you will get a link in this report to the ARCP form itself.
- Review Outcomes – A list of all the Trainee reviews and the Educational Supervisor recommendation that was made.
- Educators’ Notes - copies of Educators’ Notes that you have submitted for the Trainee.
- Reviews – For the Trainees that you completed a review for, you will see this option. This will present to you the 4 page review the trainee and ARCP sees. This combines your comments with the respective parts of the ePortfolio.
- ARCP’s - the individual ARCP forms for the Trainee.

Records will be exported as a PDF file.
Frequently Asked Questions (FAQs) and Help

Functions Available
• View FAQs
• View Help Files

Legals | FAQs | Resources | Contact Us | RCGP Main Website

To read any of the frequently asked questions, click on the item to display its contents.

* Frequently Asked Questions

01. Assessments - how do I get them completed?
02. Curriculum – what do I need to learn?
03. Declarations and Agreements - how do I sign them?
04. Educational Supervisor and Trainer – how can I contact them?
05. Educational Supervisor, Trainer and Posts - How do I add them?
06. Adding the Postgraduate Dean/Responsible Officer
07. How do I add meetings or appraisals that are not the six monthly review?
08. How do I change my userid?
09. How do I change personal details?
10. Download the ePortfolio
11. If I validate a record my trainee shares with me, does this mean I have deemed them competent?
12. Keeping parts of the ePortfolio private – which parts and how do I do this?
13. Linking to Learning Logs and PDP
14. MSF - How to get one done
15. How do I obtain Ticket Codes for Assessments
16. MSF/PSQ How do I view the feedback and summary?
17. OOH – how do I record Out of Hours/CPR?
18. REASSESS – How do I submit REASSESS?

Also available via the FAQs link is the ‘help’ section - the link appears at the bottom of the left hand menu. This is where you may find support documents uploaded by your Deanery/LETB.

Help

Find: 
Uploaded by: ____All____

These help files contain extra information in the form of powerpoint slides, word documents, pdfs or pictures. Select the media type you require by clicking the icon.
ePortfolio Enquiries allows all users to log any enquiries that they may have about the system. Any questions that appear regularly will be added to the FAQs.

On this screen you can view current and completed support logs (use the tabs to navigate between these).
To view an enquiry that you have open, click on the subject title to open the log.
CREATE NEW ENQUIRIES

1. Click on ‘Enquiries from the left hand menu then the ‘New Enquiry' button.
2. This will open up a new page which allows you to input the enquiry.

3. Input the subject and message that you would like to log.
4. Click ‘Submit’.
5. The screen will refresh to display that the enquiry has been logged with a corresponding reference number.
SECTION II: EDUCATIONAL SUPERVISOR FUNCTIONALITY

Educational Supervisors are given additional functionality further to the Trainer functions. These appendices cover the additional tasks and functions for the Educational Supervisor.

COUNTERSIGNING DECLARATIONS

It is necessary for Educational Supervisors to countersign the Educational Agreement that each trainee must sign. This will only be available for countersigning after the trainee has signed them. To countersign the Agreement, follow the steps below:

1. Select the relevant Trainee after logging in as educational supervisor.
2. Select ‘Summary’ from the left hand menu
3. Scroll to the section on the page titled ‘Declarations’
4. If the trainee has signed the Agreement it will say ‘Click here to sign’. Click here to read and sign the Agreement.

If the trainee has not signed a declaration then it will read ‘Not signed’. To be able to countersign the Educational Agreement you will need to remind your trainee to sign it.

You will not be able to create a review without countersigning the Educational Agreement.
**View and Release MSF**

After a valid review has been created (see page 24) an Educational Supervisor can view and release the results of the MSF to the trainee to view. Follow the steps below to view and release the MSF:

1. Click on ‘Select a Trainee’ from the menu.
2. Locate the trainee whose results you wish to release and then click to view the trainee summary page.
3. Click on ‘Evidence’ on the menu bar.
4. Select the correct review period using the drop down box and then click on ‘MSF’.

5. Click on the ‘Analyse Submissions’ button.
6. You can view a summary report of the feedback before releasing it.
7. Scroll to the bottom and add any comments you wish to make. Please note that these comments will be seen by the trainee. This feedback would be relayed to the trainee during a feedback interview.
8. Once you are happy with the submission, click on the confirmation drop down box and select ‘Release scores to trainee’.
9. Click on ‘Confirm’ to release.

---

### Educational Supervisor comments for the trainee

(These will be viewed by the trainee with the graph summary)

<table>
<thead>
<tr>
<th>Confirmation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Released</td>
</tr>
<tr>
<td>Release scores to Trainee</td>
</tr>
</tbody>
</table>
**VIEW AND RELEASE PSQ**

After a valid review has been created (see page 24) an Educational Supervisor can view and release the results of the PSQ to the trainee to view. Follow the steps below to view and release the PSQ:

1. Select the relevant Trainee after logging in.
2. Click on ‘Evidence’ on the left hand menu.
3. Select the correct review period using the drop down box and then click on ‘PSQ’.

4. Click on the ‘Summary’ link (a minimum of 40 forms need to have been submitted and summarised in the site).
5. You can now view a summary report of the PSQ responses before releasing it.
6. Scroll to the bottom and add any comments you wish to make. Please note that these comments are viewed by the trainee.
7. Once you are happy with the submission, click on the ‘Release Scores to Trainee’ confirmation radio button and click ‘Save’ to publish the results.
**Record Competences**

Educational Supervisors are responsible for rating trainees against the 12 competence areas. Comments can also be added for viewing by Trainees and Trainers. The trainee will be required to self-assess before the Educational Supervisor records their comments and ratings. Follow the steps below to record competences.

1. Click on ‘Home’ from the menu.
2. Locate the trainee name and select.
3. Click on ‘Review Preparation’ on the left hand menu bar - a review needs to have been created for the period.
4. Click the ‘edit’ icon for the relevant review.
5. Complete the review as required to get to the ‘Competence Areas - Educational Supervisor’ section and click on the ‘edit’ link to the right.

6. Rate the competence using the drop down box.
7. Add any comments you wish to make and any actions required before the next review.
8. Link to the PDP and agreed learning (optional - this copies the text of the ‘actions’ box in to the agreed learning plan section on the final page - this can only be used for a maximum of 5 entries.)
9. Answer the question after the list of evidence ‘Does the ES agree that the evidence the trainee has provided demonstrates sufficient progression in the current review period?’ by selecting the appropriate radio button (yes/no).
10. Click on ‘Save’.
HELPFUL CONTACT DETAILS

Below are some contacts in case of any errors or problems you encounter with ePortfolio.

WPBA and General ePortfolio Enquiries:

ePortfolio Helpdesk
Email: tep@rcgp.org.uk
Telephone: 020 3188 7655