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Introduction

This manual is divided into two sections. The first section provides a guide to the navigation and functions within the Trainee ePortfolio, including access and administration of trainee’s data.

The second section provides guidance on functionality available for Deanery administrators, such as managing locations, and user management.

This guide has been updated in June 2018.

Further information

For additional resources for administrators, please visit: http://www.rcgp.org.uk/training-exams/mrcgp-trainee-eportfolio.aspx
Section I: The ePortfolio and Administration

Login and home page

You will have been provided with a username and password. To log in, go to https://trainee.gpeportfolio.rccp.org.uk/ and click the ‘Login’ button under ‘Trainees, Supervisors and Administrators’.

Please note that the password is case-sensitive. If you have forgotten your password, click ‘Login’ and then select ‘Forgotten your password?’. 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’re logged in, you will usually need to select which role you wish to log into, and you will be then taken to your home page.

The column on the left allows you to navigate through the system that has been tailored for your access level.

In the next few pages we will look into personal details and messaging through ePortfolio.
**Personal details**

The Personal Details section contains information such as address, email, phone number and login details. Your registered email address will also be your username. To access this information, select ‘Personal Details’ on the left toolbar.

To change your password, click the ‘Change Password’ tab. The password must have a minimum of six characters with at least one capital letter and one number. To update it, click on the save tab at the bottom of the page.
**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.
Compose (sending messages)

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 the name for the 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 and 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.
Administration

As an Administrator you can run a variety of tasks and find information that may need to be updated or viewed. The panel on the left of the screen shows all the options available. In this section we will look at these options individually.

Trainees

Functions Available

- View each trainee’s posts (previous, current or future).
- Edit trainee and post details
- Create new posts for trainees
- View the trainees’s profile

As a Regional Administrator you will be able to ‘see’ all trainees within your Deanery/LETB; these could be trainees that are located in a variety of different trusts. The trainee has a principal location (usually set initially where their first post is situated). Each post will have a location associated with it also, and can even be in a different trust or in a GP rotation. ‘Locations’ are usually a specific hospital.

Trainees (as shown below), are listed by name with their current post details. This can be changed so that you can view trainees by Name, Grade, and Location. A secondary filter can be applied combining two of the following details: Grade, Region and Location. To view details on each trainee, click on their name. You can also click on the ‘Not in Post’ link to view all the trainees within your Deanery that currently do not have a post assigned to them, or ‘Never in post’ to view trainees that have never been in a post.

To view trainee’s previous posts, click on ‘View’ under ‘Posts’ column.
Trainee’s dashboard and summary page

The trainee profile that a Regional Administrator can view, contains information such as personal details (name, GMC number, email address etc.), declarations etc.

1. Select the trainee whose information you would like to view.
2. The trainee’s dashboard will appear on screen.
3. Click on ‘Summary’ in the left hand menu to access the summary page.

You can also access other areas of the ePortfolio, including the Personal Development Plan, Reviews, Log entries and their Progress to Certification.
Historical declarations

By Clicking on the Historical Declarations link under the current declarations, you will be taken to a page that shows the declaration signings for older posts. This is for information purposes only, and if a declaration was not signed during a post, it cannot be signed retrospectively.

View trainee’s evidence

Select the trainee whose information you would like to view and click ‘evidence’ in the left hand menu. A new screen will show a report containing evidence collected during the current review period. 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 two 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 an option labelled ‘(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 reviews, please see page 16.

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 CEPS information for this trainee.
From this screen you can preview the evidence collected for the trainee.

Click on ‘view submissions’ for visibility of individual forms.

Please note, to view the correct review period summary a review date must be set.
Edit trainee and post details

As an Administrator, you will be required to update and maintain Trainee Post information.

You can access this function in two ways:

- While browsing individual’s Trainee ePortfolio, click Posts in the left-hand menu.
- While on Trainees page, click ‘View’ next to trainee’s name on the list.

In this screen you will also be able to view future posts for the trainee. The Trainer, Educational and Clinical Supervisor’s names for the posts are also available here.

To edit post details, click on the ‘edit’ icon. To create a new post, click on the ‘New Post’ button at the bottom of the page.
You can edit information for the post you selected on the previous screen. Then click ‘Save’. Every section marked with a red asterisk (*) is compulsory.

You need to ensure that the Start and End dates of the post do not overlap with another post.

You can assign up to five Trainers/Clinical Supervisors to a post at once. It is recommended you only assign these as required; ideally no more than two at once.

You can also delete a post if created in error or duplicated, but please use this function with caution.

Create new post for trainee

To create a new post for the current trainee follow the steps below:

1. Click ‘Posts’ in the left-hand menu or click ‘View’ on Trainees page.
2. On Posts page, click on the ‘New Post’ button.
3. Fill in the details in the form using the drop down boxes. Then click ‘Save’.

The boxes with a red asterisk (*) are compulsory. The post dates will default to six months from the last post end date in the system for the trainee. You can assign up to five Trainers/Clinical Supervisors to a post, but it is recommended that this number is kept to the minimum required.

Edit post details

Existing trainee posts can be amended. Follow the steps below:

1. Click ‘Posts’ in the left-hand menu or click ‘View’ on Trainees page.
2. Click the ‘edit’ icon next to the record you want to update.
3. You will be able to change the post details for this post including the Grade, Work Time Equivalent percentage, Specialty, Location, dates and Supervisors.
Educators’ notes

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.
Reviews

Selecting ‘Review Preparation’ from the sidebar will show the reviews that have been completed and created for the trainee. You will get a list of the reviews and their outcomes. Clicking on ‘View’ will give you the review in more detail.

You have the option of editing review dates and creating new reviews.

If you click on the ‘edit’ icon, you are able to change the date, type and post of the review. If the ‘View Review Details’ option appears, you can't edit the review.

You can use the ‘Add New Review’ option to setup reviews for Educational Supervisors to complete if needed.

You can also download completed ESRs as a PDF file by clicking ‘Download’ next to the relevant record.
Progress to certification

Selecting ‘Progress to Certification’ from the sidebar will show the trainee’s progress towards completion of training. Here you can see their AKT and CSA results, if they have completed their OOH, Safeguarding children and CPR/AED requirements, and there is another link to Reviews here. You will also be able to see completed ARCPs that the trainee has accepted.

Create manual ARCP

ARCP’s are usually generated from a review being completed and signed off. There are exceptions whereby an ARCP needs to be generated manually – if this is the case, check to see if you have access to the link above. Click this link and you will be taken to the next screen and be able to choose the following reasons for creating an ARCP:

- OOP (Out of Program)
- Outcome 5 – review of additional evidence
- Trainee Resignation
- Non engagement

As advised on the above screen, only manually create if it is for one of the reasons listed here. If you are not sure whether you can or should perform a manual ARCP creation, please contact the helpdesk.
ePortfolio enquiries

**Functions Available**
- View existing support enquiries
- Create new enquiries

Enquiries allows all users to contact the RCGP Helpdesk with any enquiries about the system. Any questions that appear regularly will be added to the FAQs.

On this screen you can view current and completed enquiries (use the tabs to navigate between these). When your open enquiry is resolved, it will be moved to the 'completed' tab. To view a submitted enquiry, click on the subject title to open it.
Create new enquiries

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

3. Add the subject and enter your enquiry.
4. Click 'Submit' when ready.
5. The screen will refresh to display that the enquiry has been logged with a corresponding reference number.
Section II: The ePortfolio Management

Functions Available
- Edit locations within your Deanery
- Create a New User/Add or Change a Non-Trainee User’s Role
- Import Post information for new Trainees
- Create New Training events
- Create New Help Items
- View Trainees’ Deanery Panel status
- Create/Edit Panel Groups for ARCP
- Create/Edit Panel Members for ARCP
- Change a Non-Trainee Users Location
- Confirm/Update PG Dean
- Run reports on ePortfolio information

The ePortfolio Management section is limited to Regional Administrators and Local Administrators only. By using this section you will be able to go through the fundamental steps of the ePortfolio that allow you to add and edit various items.
Edit locations within your Deanery

1. Click ‘Management’ in the left hand menu then ‘Locations’.
2. You will be presented with a list of existing locations. Click on one to edit or scroll to the bottom of the page and click on ‘Add Location’ and you will see the following:

   ![Add / Edit Location](image)

3. Insert the name of the new location and select the ‘Region’ it belongs to in the dropdown menu.
4. Click the ‘Save’ button.
5. The new entry will appear in the list.

Please note: if you wish to edit an existing entry and a required change is anything more than just a text correction, ‘deactivate’ the old item and add a new one, instead of reusing the existing location. This will prevent corruption of data for old posts.

User management

Create a New User

1. Click ‘Management’ in the left hand menu then ‘Users’.
2. You will be presented with a list of existing users, scroll down and click the ‘Add New’ button.
3. Complete the form. Not all fields are mandatory although it is important to put in as much information as possible; an email address is required.
4. Click the ‘Save’ button.
5. You will be returned to the user list. The new user will receive their login information by email.

Please note, if a user already exists in the system with the same email address, you will be prompted with a warning message:

![Warning](image)

Also, if an email address or GMC number has been entered and either of these matches is an existing entry in the database, then the ‘Create new user’ button will be disabled and the user cannot be created.

Add or change a user’s role/change location

Users other than trainees can have more than one role. For example a Regional Administrator may also be a Trainer. (Note: A Regional Admin cannot be a Local Admin and vice versa).
When a user has multiple roles, they will see an area in the left hand menu bar called ‘Switch Role’ which allows them to choose between available roles; therefore, you do not need to create additional accounts for one user.

1. Click ‘Management’ in the left hand menu, then ‘Users’.
2. You will be presented with a list of existing users and the roles they have assigned, click the ‘edit’ icon for the individual to change or add a role.

3. The user’s current roles will be indicated with a tick. Tick the box or boxes to apply the appropriate change/addition. Please note that a user must have at least one role.

4. You can also change the user’s location via the dropdown box.
5. Click on ‘Save’ to save the changes.

**Using the ‘Import Posts’ Function**

The ‘Import Posts’ function allows users to import new trainees’ Post information in bulk by importing a comma separated values (csv) file.
This function is available to all Regional Administrators under the ‘Management’ option.

The template can be downloaded from the same page.

![Import Posts]

The values required in the spreadsheet are, as above; GMC number, Location, Start Date, End Date, Grade, Work Time equivalent as a percentage number and Specialty. If there are no issues, a Post with this data will be entered in to the Trainee's ePortfolio.

The Educational Supervisor/Trainer information cannot be imported and will require a manual entry in Posts.

**Note:** the website is not copying and pasting the data on import, rather it is comparing it to a table of pre-set values – if it is unable to match these pre-sets it will return a warning. The relevant information will then need to be entered manually against the trainee in the website.

The minimum required ‘correct’ data for a trainee to allow an import includes the GMC number and the ‘Start Post’ and ‘End Post’ dates and Location. As long as these are valid, an entry will be made in to the ePortfolio. Any subsequent values that ‘fail’ with the associated warning will need to be manually entered against the trainee’s details in the website.
Below the progress box is the summary section:

![Import Complete](image)

Here you will see how many imports were successfully completed along with any 'Warnings' and 'Errors' relating to the import. Please see below for what these error messages mean.

**Warnings**

'Import Warning: On Row: 6, For Specialty: The value (“Deprecate”) was not found in our database or our Lookup table for your Deanery’

The website has failed to match or recognise the value ‘Deprecate’ – hint: avoid abbreviations for specialties e.g. ‘Paediatrics’ would work. Instead of ‘O&G’, use ‘Obstetrics & Gynaecology.’ Alternatively, a more obscure specialty may not exist in the database and this warning will occur.

A similar example here:

'Import Warning: On Row: 19, For Location: The value (“GP Placement to be Confirmed”) was not found in our tables or our Lookup table for your Deanery'

This means that on row 19, in the ‘Location’ column, the website doesn’t recognise the entry ‘GP Placement to be Confirmed.’ Similar errors may indicate that the location has been written in a different way or may not even exist as compared to the pre-existing entries in the website database.

Another one:

'Import Warning: On Row: 16, For WTE: The value (“”) was not found in our tables or our Lookup table for your Deanery’

This means that on row 16 in the column ‘WTE’ the website recognises that a value that it expects to find is missing i.e. there is nothing for this field on the original spreadsheet.
Errors

‘Import Failed: “Post From” and “To Date” already entered for that trainee. Row: 22’

This error usually indicates that a trainee, in this case the one on row 22 of the excel spreadsheet, has had their details imported already – the import system will not duplicate entries, therefore not allowing the operation to be run multiple times with the same file. Any changes or updates to a trainee’s details if they have already been imported in to the system should be entered directly in to the website.

‘Import Failed: “Post - From Date” Invalid on row: 494’

The above error indicates that the data for the ‘Post - From Date’ is incorrect for the trainee on row 494 of the spreadsheet. This could relate to the format the date is in or the date itself. A correct date will be in the format, ‘03/08/10’, whereas having, ‘Aug 10’ will return an error.

‘Import Failed: “GMC Number” Invalid on row: 570’

The above error indicates that either the format and/or value of the GMC on row 570 is incorrect e.g. should be numbers only.

‘Import Failed: Record Insert Failed: Trainee with GMC Number: 123456, not found in our database’

This error normally indicates that a trainee has not registered yet or that their registration details have not yet been updated – if they have registered try the import 24 hours later.

Training Events

Navigate to the ‘Training Events’ section via the ‘Management’ option in the left hand menu.

Functions Available
- View, edit or delete training events advertised on ePortfolio.
- Add new events

Training events that are available for trainees and all others are can be entered here. All the information that you require such as dates, duration, price and type can be added.

Trainees can view these entries via the ‘Resources’ link at the top right of the page once they are logged in.
Edit or delete an event

1. To edit an event click on the ‘edit’ icon for the event. A window similar to the one below will open.
2. Edit the information as you require then click ‘Save’.

To delete an event select the ‘delete’ icon.

Add a new event

1. Click on the ‘Add New’ button.
2. A new event window will appear allowing you to input information. Make sure as much information as possible is entered.
3. Then click ‘Save’ to add the training event to the list.

Help items

Add new help items

There are two sections involved in adding help items to the ePortfolio. The first section is to create the entry by giving the title and a brief description; the second section involves adding the attachments.

1. Click on the ‘Add New’ button.
2. A new event window will appear allowing you to input the title and a brief description.
3. You can also select your target audience whether you want it to be viewed by your Deanery/LETB only or all users of the ePortfolio.
4. Click on ‘Browse’ for your help item to choose a file to upload with your entry.
5. Click ‘Save’ to create the entry.
6. You will be returned to the ePortfolio help page where you will see the entry you created.

The types of media that you can add are:
- Text files
- PDF
- PowerPoint
- Word Documents
- OpenDocument
Help items administration

Functions Available
- View help files within ePortfolio
- Add new help items

The help files within ePortfolio can be updated by all Administrators. The more helpful the information is, the fewer problems users are likely to face. A brief description of the item is provided with further information being available in the form of a document or image. A local copy of the file is stored within ePortfolio so the location of the file that you import is not an issue.

Trainees can access the help items after logging in by clicking on the ‘FAQs’ link at the top of the page and then selecting ‘Help’ from the left hand menu.

To view an existing help entry simply click on the title. A new web browser page will open for you to view the entry. If the entry has an attachment, click the 'Download' link to access it.
Deanery panels

Functions Available
• See which trainees in the Deanery/LETB have been put forward to an ARCP panel.

To access the ‘Deanery Panel’ section, select ‘Management’ from the left hand menu and then ‘Deanery Panel’.

You will be able to see each trainee who has had a review completed since the last ARCP Panel.

The status column tells you how far through the ARCP process they are:
• **Review Pending**: Review completed, but ARCP not started.
• **ARCP in Progress**: The ARCP form has been started but not completed.
• **ARCP Complete**: The ARCP form has been completed and sent to the Panel Chair to sign off.
• **Chair Sign Off**: The Panel Chair has signed it off, and is waiting for the trainee to accept the ARCP.

Clicking on the trainee name will take you to the trainee's ePortfolio record.

Add panel groups

This function allows you to enter and maintain a list of possible Panel Groups to which you can add Panel Members for selection on ARCP forms.

1. Access the section by clicking ‘Management’ then ‘Panel Groups’ from the left hand menu.
2. Click on the ‘Add New’ button, enter the name and description of your Panel Group and click ‘Save’. This will return you to the main Panel Group section.
3. You can keep adding as many Panel Groups as you like or edit an existing one using the ‘edit’ icon.
4. If you no longer need a panel group, click the ‘Delete’ icon next to the relevant entry.
5. To add panel members to a group, go to the ‘Panel Members’ section to link individuals as required (more details below).

Add panel members

This function allows you to enter and maintain a list of possible Panel Members for selection on ARCP forms.

1. Access the section by clicking ‘Management’ then ‘Panel Members’ from the left hand menu. This will show a list of existing Panel members, their designation and what panel groups they have been assigned to.

2. For a new entry, click on the ‘Add New’ button near the bottom of the page. Enter the name and Designation (e.g. Panel Chair) of your Panel Member into the respective boxes, tick the Panel Group or Groups that you wish to assign them to (this can be done later) and then click ‘Save’. Your Panel Member will now appear in the list and be selectable at ARCP.
3. You can keep adding as many Panel Members as you like. If you have someone that has more than one role, please add them twice, with a different designation each time.
4. If you need to remove someone, you simply click on the ‘Delete’ button next to their entry. This will remove them from the list of selectable Panel Members, but not from any ARCP forms that they have already been added to.
5. You can link individuals to panel groups by editing their record and ticking the group or groups they belong to.
6. To add multiple panel members to a group, tick the box next to the relevant names from the list; click the ‘Assign to Group’ button and tick the relevant group(s) and then click ‘Save’.
7. To remove individuals from a specific group, click on the ‘edit’ icon in the ‘members’ list next to the name of that individual.

8. Untick the box next to the relevant group name and click ‘Save’
Postgraduate dean management

This function allows you to enter and maintain the display name of the PG Dean for the ARCP forms. It will not be possible to sign off an ARCP form if this value is blank.

![Postgraduate Dean/Responsible Officer (RO) Management](image)

Reports

Several report options are available within the ePortfolio. Clicking on Reports will allow you to see the current report options.

![Reports](image)

For most reports if you click on ‘Generate’, another page will open with options for parameters.
These can vary:

From a tick box selection;

![List of those on sabbatical, maternity, paternity or sick leave details](image1)

A dropdown selection;

![List of Trainees in specific ST Year details](image2)

Or start and end dates.

![ARCP Outcomes in a period details](image3)

After selecting your parameters, click on ‘Generate’. This will take you to a list of generated reports and list the newly requested report as ‘In Progress’.

Navigate away from this page and return 30-60 seconds later using the link near the top of the reports section.

![Reports](image4)

From here, you can download the report. You can also download any previously generated reports and delete any old reports which are no longer required.

All reports will download in an Excel format (.xlsx).
Helpful contact details

If you have any queries about using the ePortfolio, please contact the RCGP Helpdesk.

RCGP Helpdesk

Enquiries: You can contact us by selecting ‘Enquiries’ from the left-hand side menu in the ePortfolio.

Email: tep@rcgp.org.uk

Telephone: 020 3188 7655 (Mon-Fri 09:00-17:00, except for Wednesdays between 15:30-16:30 when the Helpdesk is closed for brief training)