The ePortfolio for GP Speciality Training
A guide for Trainers and Supervisors

Updated April 2020
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Introduction

This manual is designed to explain the use of the ePortfolio for Trainers, Clinical Supervisors and Educational Supervisors.

Throughout this manual, the term Trainer is used to denote both Trainers (in GP setting) and Clinical Supervisors (in hospital setting).

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 attention to this section.

Further information

For additional resources for trainers and supervisors, please visit: www.rcgp.org.uk/tep
Section I: The ePortfolio

Login and home page

Your account will be created for you by your Deanery/LETB. You will have been provided with a username and password. To log in, go to https://trainee.gpeportfolio.rcgp.org.uk/ and click the 'Login' button under 'Trainers, 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.

Please note that panel member and panel chair accounts can log in using the 'Trainers, Supervisors and Administrators' login.

In the next few pages, we will look at 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-hand 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. Code of Conduct for all users can be found in the ePortfolio.

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 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.

<table>
<thead>
<tr>
<th>To</th>
<th>Subject</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Amos</td>
<td>Sample draft message edit</td>
<td>26/03/2014</td>
</tr>
</tbody>
</table>

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.

Trainee related activities

The trainee activities relate to functions the Educational Supervisor or 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 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.

To switch 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.
Selecting Trainees

Trainees linked to you will be shown on your home page. You can click a trainee’s name to go to their dashboard or use the shortcuts menu to access specific areas of their ePortfolio. The side bar will always show your currently selected trainee. If you’re linked to more than one trainee, you can change the selection by going back to your home page.

To return to your home page, click on ‘Home’ above ‘Personal Details’.
Dashboard and summary page

Trainee's dashboard and Summary page give you an overview of the contents of the trainee's ePortfolio.

On the Summary page, you also have access to the trainee's declarations. Trainers can only view the declarations, while Educational Supervisors countersign the Educational Agreement once the trainee has signed it.

<table>
<thead>
<tr>
<th>Declaration</th>
<th>Signed By</th>
<th>Signed Date</th>
<th>Countersigned Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Agreement</td>
<td>Trainee</td>
<td>12/11/2019 13:09</td>
<td>04/02/2019 12:05</td>
</tr>
<tr>
<td>Probity: Professional Obligations</td>
<td>Trainee</td>
<td>12/11/2019 13:10</td>
<td>Not required</td>
</tr>
<tr>
<td>Health: Professional Obligations</td>
<td>Trainee</td>
<td>12/11/2019 13:10</td>
<td>Not required</td>
</tr>
<tr>
<td>Probity: Convictions and disciplinary actions</td>
<td>Trainee</td>
<td>04/02/2019 12:01</td>
<td>Not required</td>
</tr>
<tr>
<td>Health: Regulatory and voluntary proceedings</td>
<td>Trainee</td>
<td>04/02/2019 12:01</td>
<td>Not required</td>
</tr>
</tbody>
</table>

To read about countersigning the Educational Agreement, go to page 34.

You are also able to see which declarations your trainee has signed in previous posts, by clicking on 'Historical Declarations'. Historical declarations cannot 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 capability

The learning log allows a trainee to record a wide range of learning opportunities that will arise during the training. 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 added to the log entry.

The number of unread logs you have for your trainee will also be shown on their dashboard.

Navigate the learning log

The Learning Log has several tools to help you navigate it. By default, the system shows the most recent entries. You can apply multiple filters and use search to browse Learning Log. Click the “Search” button to apply or clear filters.

1. You can use the ‘type’ drop-down box to display specific types of entries.
2. You can enter keywords to search for Learning Logs containing specific text.
3. You can use date fields to display logs created between specific dates.
4. You can apply filters to display logs which are shared, read, have comment, have attachment and logs with unread comment.

5. You can also click on any of the headings to sort by that column type.

6. By default, the system displays ten logs per page. You can change the number from the drop down. You can switch between each page by using the page number links.

**Read and lock a log entry**

To read and lock a shared log entry, follow the steps below.

1. Click on 'Learning Log' on the left-hand menu.
2. When you have found the entry you wish to view, click the log's title to open it.
3. You can mark the entry as read by clicking on 'Mark as Read/Lock' at the top of the screen.

The entry is then marked as read and prevent further editing by the Trainee. Please note that this cannot be reverted. If you want the trainee to make some changes to the entry, DO NOT mark it as Read/Locked.

**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. When you have found the entry you wish to view, click the log's title to open it.
3. Click on 'New Comment' at the bottom of the screen.

4. Enter the comment and 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 capability area and shows meaningful reflection. Validation does not imply that capability has been achieved. This function can also be used to add or amend links to clinical
experience groups – use ‘Select Descriptors’ tab to make changes.

1. Click on ‘Learning Log’ on the left-hand menu.
2. When you have found the entry you wish to view, click the title next to the entry.
3. Click on ‘Validate evidence’.

4. Tick to add a professional capability and then ‘Save’. You can also remove any current selections.
5. If you wish to amend the links to clinical experience groups, click the ‘Select Descriptors’ tab.

The clinical experience groups map to ‘clinical experience groups coverage’ and professional capabilities map to the ‘Capability Areas’ in the reviews. They can be viewed in summary tables via the respective links in the left-hand menu.

Clinical experience groups were introduced in September 2019.

- Any learning logs linked to previous curriculum will maintain their association to the curriculum statement headings. These links will be displayed under ‘archived selections’ heading within a learning log entry.

- Learning logs created or edited after the September 2019 update can be only linked to clinical experience groups.

- A link will be displayed under the clinical experience groups summary table if trainee’s logs have been linked to previous curriculum – depending on the curriculum version, user may see ‘Expand Curriculum Statement Headings 2013-2018’ and 2010 links. Clicking one of these links will display a curriculum statement headings summary table, which shows log entries linked to the previous curriculum.

- For more information about the curriculum, please go to [www.rcgp.org.uk/curriculum](http://www.rcgp.org.uk/curriculum)
Personal Development Plan

Functions Available

- View trainee’s PDP entries

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.

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 'displaying' dropdown menu shown below.

As a Trainer, you can only view the personal development plan in this section. You can however make some amendments to your trainee’s PDPs as a part of the review process. More information can be found on page 23.
Evidence

Functions Available

- View submissions information
- Complete new submissions

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 (view only)
- PSQ (view only)
- MiniCEX
-CbD
- COT
- Audio-COT
- CSR (Clinical Supervisor only)
- CEPS
- Prescribing assessment

Evidence summary

You can view your trainee’s current assessments on this page. The ‘completed’ column shows the total number of assessments that have been submitted.

If a trainee is in a review period, the page will automatically show the number of assessments that the trainee has completed in preparation for their next review.

You can customize the view using the review type and review number dropdown boxes. 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 creating reviews, please see page 21.

You can view the total number of assessments completed throughout the training by selecting 'all years' in 'Review type' box and 'all reviews' in 'Review number'.

For a detailed look at each of the assessments, click on the tab with the assessment name you would like to see. Each of the assessment screens will have similar layout. 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' to see the individual forms.

Please note to view the correct review period summary a review date must be set. Please see the review date section on page 22.

Complete new submissions

As a Trainer you can complete new submissions for MiniCEX, CEPS, CbD, COT, Audio-COT, CSR and Prescribing assessment. We will continue using CEPS as an example.
1. Click on CEPS as circled above
2. Click on the 'Fill'
3. A blank form will open, allowing you to complete the assessment.
4. Click ‘Submit’ once completed.
Posts

In this section of the ePortfolio you can check the Post details for the trainee. This can include past, current and future Posts. Please note these are added/updated and edited by the LETB/Deanery.

<table>
<thead>
<tr>
<th>Posts</th>
<th>Dates</th>
<th>Educational Supervisor</th>
<th>Clinical Supervisors/Trainers/Academic Supervisors</th>
<th>Assessments</th>
</tr>
</thead>
<tbody>
<tr>
<td>DH/Teach Post 1/2 BGS</td>
<td>04/06/2010-07/12/2010</td>
<td>Jamie Meecham</td>
<td>Ching Kohani</td>
<td>View</td>
</tr>
<tr>
<td>18/General Practice/Full Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAX/Teach Post 1/2 BGS</td>
<td>08/12/2010-08/05/2011</td>
<td>Jamie Meecham</td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Test Location 1/2/18/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VSA/Teach Post 1/2 BGS</td>
<td>07/12/2011-31/07/2012</td>
<td>Jamie Meecham</td>
<td>Jamie Meecham</td>
<td>View</td>
</tr>
<tr>
<td>Test Location 1/2/18/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STA/Teach Post 1/2 BGS</td>
<td>01/08/2012-12/01/2013</td>
<td>Michele Yuan ES</td>
<td>Jamie Meecham</td>
<td>View</td>
</tr>
<tr>
<td>Test Location 1/2/18/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STA/Teach Post 1/2 BGS</td>
<td>01/02/2013-01/09/2014</td>
<td>Michele Yuan ES</td>
<td>Jamie Meecham</td>
<td>View</td>
</tr>
<tr>
<td>Test Location 1/2/18/2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STA/Surgery/General Practice</td>
<td>02/08/2013-01/08/2014</td>
<td>Educational Supervisor OT</td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

Clinical experience groups

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 clinical experience groups coverage section allows you to see how many log entries the trainee has completed and linked to each of the clinical experience groups.

Click ‘Clinical Experience Groups’ in the left-hand menu bar and the following table will be displayed:

<table>
<thead>
<tr>
<th>Clinical Experience Groups Coverage</th>
<th>Name</th>
<th>Linked Learning Logs In Current Review</th>
<th>Linked Learning Logs In Current ST Year</th>
<th>Linked Learning Logs Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Infants, children and young people under the age of 19</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>2 People with mental health needs (including addiction)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>3 People with long-term conditions and disability</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>4 Frail and/or elderly people (including multiple morbidity and care of the dying)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>5 Gender Health (Women’s, Men’s and LGBTQI Health)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>6 People requiring urgent and unscheduled care</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>7 People with health disadvantages and vulnerabilities (for example veterans, mental capacity difficulties, safeguarding issues, and those with communication difficulties)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>8 Health promotion and people with non-acute and/or non-chronic health problems</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Please note – Any Learning logs linked to the previous versions of the curriculum can be viewed by clicking on the link ‘Expand Curriculum Statement Headings 2013-2018’ or ‘Expand Curriculum Statement Headings 2010’, located below the table.
The table shows you each of the clinical experience groups and how many logs are linked to each group. This is summarized by the review period, ST year and in total.

To look at logs linked to each group, click on the number. A new window will appear, showing the linked logs. Click on the title of the log entry to review and validate. For more information on the shared entries, please see page 11.

**Educators’ notes**

This section allows 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 do not fit easily anywhere else or additional information you feel is important that you cannot enter anywhere else. Each entry is date stamped, with the name of the person who entered it and a subject field. Trainees can view everything that is entered in this section, but are not able to add any comments, and can only respond through their learning log. Notes are also 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.

To see existing notes, click 'View' or ‘Expand all’ button.
Progress to Certification

In this section you can view the trainee's progress towards completion of training. Some requirements need to be confirmed by the Educational Supervisor in the final review (out of hours session requirements, CPR and AED certificate information and safeguarding). For more information, please see page 27.

Progress to Certification

<table>
<thead>
<tr>
<th>Target</th>
<th>Progress</th>
<th>Date</th>
<th>Achieved</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>AKT</td>
<td>No results</td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>CSA</td>
<td>No results</td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Holds valid CPR and AED certificate</td>
<td>Not met</td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Has met out of hours session requirements</td>
<td>Not met</td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Safeguarding children</td>
<td>Not met</td>
<td>05/01/2017</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reviews</td>
<td>Most recent ST1-6</td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>ARCPs</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

The selected trainee has either never been in a post or has an ARCP already in progress. It is not possible to create a manual ARCP.
Reviews

Functions Available

- Create and amend review date
- Review trainee coverage of Clinical Experience Groups
- Review trainee self-rating
- Review trainee progress against Professional Capabilities

The ‘Review Preparation’ section allows you to review trainee's coverage of the clinical experience groups and their progress against professional capabilities in a given review period.

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.

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.
1. Click on 'Review Preparation' on the left-hand menu bar and then 'Add New Review'. Note: you cannot create or edit a review until the Educational Agreement has been countersigned.

2. The Setup page will appear. You are required to set the end of review date and location for the trainee review. This must be completed before the review takes place. The date will default to six months from the last review date. You will just need to ensure you select the correct ST year for the review.

3. 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.

**Review dates**

The ‘end of review period’ review dates determine where evidence and the capability 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 six-month review period. This will allow all the trainee evidence and the capability 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 or edit each section at your convenience, as opposed to completing the review in one sitting.

**Review feedback**

Once the review has been created, 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.
Clinical Experience Groups Coverage

The first area that you get the option to comment on is the Clinical Experience Groups Coverage. Through their learning logs, the trainee can demonstrate how they’re covering the clinical experience groups. This is your opportunity to comment on how they are doing, and identify areas for improvement.

Skills log

The skills log tab shows a read-only summary of read-only DOPS assessments. To continue to the next section, click 'continue'.

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. The supervisor can edit the ones that have not been achieved and add PDPs.
Capability Areas

Assessment against the Professional Capability Areas – Trainee Self-rating

In a review, the 'Capability Areas – Trainee' section displays the ratings and the comments submitted by the trainee in their self-rating. This must have been completed and submitted by the trainee before the review can be completed.

These need to be checked and discussed before the review is completed to ensure that you have all the gathered information.

Assessment against the Professional Capability Areas – Educational Supervisor feedback

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

Select a capability area to review by clicking on a number – you can view learning logs and evidence organised by review period, ST year and in 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.

Once you have reviewed the entries, click ‘close’ and scroll to the capability areas. Click ‘edit’ next to each of the capability areas to open the rating page.

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 capability areas. 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.

Action plan

As a part of trainee's self-rating, the trainee writes three suggested actions in the Action Plan section. These will appear in the Agreed Actions. This section allows you to edit any suggested actions and add up to two further actions, after the discussion with the trainee. All actions are then summarised in a single table against the capability headings, producing a succinct plan for the trainee to use. A summarised action plan will be shown in the last page of the review.
Finish review

This 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.

The next section allows you to comment on trainee’s Clinical Examination and Procedural Skills. You can note how they are progressing and advise the trainee what areas to work on.

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 are required to select one of the four 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 six-monthly reviews.

**Completing the review**

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’ & ‘Complete & Submit’ buttons.

The ‘Save’ button saves the information entered in the review so far, so you can go back in and edit it further at a later stage.

By clicking the ‘Complete & Submit’ button, you are signing off this review as complete. This will notify the trainee and allow them to read the review and sign it. Once they have signed the review, it can no longer be edited.

Please remember that ‘Save’ only saves the draft version of the review (visible only to you and nobody else). You need to need to click the ‘Complete & Submit’ button to allow the ARCP panel to take place.

**Completing the final review**

When completing your trainee’s final review, you need to select the option ‘Do you believe this to be the trainee's final review?’.

Choosing ‘yes’ provides further options to record achievement of OOH, Safeguarding children and CPR/AED requirements. This only needs to be marked at the final review. Marking the tick boxes in this section will update the ‘progress to certification’ page once the final review is submitted.

Please note that the requirements for urgent and unscheduled care, which includes out of
hours have recently changed, so the OOH checkbox will be removed from the ePortfolio in near future.

All requirements in this section are necessary for the final ARCP sign-off by your Deanery, so it is important that for the Final Review these are ticked off.

Amend a review

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

1. Click on 'Review Preparation' on the left-hand menu.
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 capability 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 enter the exact date.

Trainer review functions

Trainers have slightly different options to Educational Supervisors. Trainers are only able to view reviews, they cannot make amendments. Click on 'Review Preparation' on the left-hand menu to see the list of all reviews.
Click on ‘View’ next to a completed review to see its contents. Use the blue tabs visible in the middle of the page to access each of the review area. You can also download any completed review as a PDF file – this can be done by clicking the ‘Download’ link from the review list.

**ST1-2 Review for Gp Trainee3**

**Personal Details**
- **Trainee Name:** Dr Gp Trainee3
- **GMC number:** 2322322
- **Route:** Unknown
- **GMC Programme/Post Approval Number:** MAT/2 RCPG Test Location 5/Ambulatory Paediatrics/Full Time
- **Training number:** MAT/2 RCPG Test Location 5/Ambulatory Paediatrics/Full Time
- **Training Programme:** Z RCPG Test Region 1
- **Name of Person Submitting Report:** Trainee
- **Position:** Educational Supervisor

**Declarations**
- **Declaration:** Educational Agreement
- **Signed By:** Trainee
- **Signed:** 04/10/2010 09:02
The Download section allows you to download sections of your Trainee's ePortfolio. All pages within the ePortfolio can be printed off individually using the printer friendly view. This can be accessed by clicking the printer icon visible at the top right of each page. 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** – 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 four-page review the trainee and ARCP sees. This combines your comments with the respective parts of the ePortfolio.
- **ARCPs** – the individual ARCP forms for the Trainee.
- **Skills Log** – access to historical skills log, only visible if your trainee has previously used it

Records will be exported as a PDF file.
Frequently asked questions (FAQs) and help

**Functions Available**

- View FAQs
- View help files
- View resources

Frequently asked questions and additional resources are available at the top of each page:

<table>
<thead>
<tr>
<th>Legals</th>
<th>FAQs</th>
<th>Resources</th>
<th>Contact Us</th>
<th>RCGP Main Website</th>
</tr>
</thead>
</table>

* Frequently Asked Questions

**GETTING STARTED**
01. What is my username? How do I change it?
02. How do I change my personal details?
03. I've forgotten my password
04. Are there any manuals?

**USING THE ePORTFOLIO**
05. Curriculum - What do I need to learn?
06. Declarations and Agreements - How do I sign them?
07. Educational Agreement: Trainees and Educational Supervisors - How does it get signed?
08. Supervisors, Trainers and Posts - How do I add them?
09. Supervisors and Trainees - How can I contact them?
10. How do I add meetings or appraisals that are not the six monthly review?
11. Reviews - When should they be completed?
12. Reviews - How to complete them?
13. Reviews - How to accept them?
14. Reviews - How can I view previous ones?
15. Self Rating - When should I complete it?
17. Self Ratings - Entered in the wrong review.
18. Learning Log - How do I create an entry?
19. Learning Logs - How are they linked to Competences and Curriculum?
20. Learning Logs - Linking to PDR

The 'Resources' area includes links to curriculum documents and WPBA capabilities.
To access this, click on 'Resources' in the top-right area of the website, and then click one of the links to access the information.

**Resources**

- Curriculum
- WPBA Capabilities
- MRCGP
- Training Events
- e-GP.org - eLearning for General Practice
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.
   This will open a new page, which allows you to submit the enquiry.

   ![Enquiry Form]

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

   ![Enquiry Table]

<table>
<thead>
<tr>
<th>Date</th>
<th>Subject</th>
<th>Support ID</th>
<th>Response From</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/11/2014 13:06</td>
<td>Another test</td>
<td>78796</td>
<td></td>
<td>Not started</td>
</tr>
<tr>
<td>04/11/2014 13:04</td>
<td>Test</td>
<td>78795</td>
<td></td>
<td>Not started</td>
</tr>
</tbody>
</table>

   [New Enquiry Button]
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.

Countersign Educational Agreement

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. After you have logged in as Educational Supervisor, select the relevant trainee.
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, you will see a link to countersign it. Click this link to read and sign the Agreement.

---

### Declarations

<table>
<thead>
<tr>
<th>Declaration</th>
<th>Signed By</th>
<th>Signed</th>
<th>Countersigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proportion: Professional Obligations</td>
<td>Trainee</td>
<td>Not required</td>
<td></td>
</tr>
<tr>
<td>Health: Professional Obligations</td>
<td>Trainee</td>
<td>Not required</td>
<td></td>
</tr>
<tr>
<td>Educational Agreement</td>
<td>Trainee</td>
<td>07/11/2014 15:30</td>
<td>Click here to sign</td>
</tr>
</tbody>
</table>

- to ensure that a range of educational opportunities are provided, both formal and informal, to ensure delivery of the specialty training curriculum of the RCGP
- to ensure that the training programme meets the standards laid down by the General Medical Council (GMC)
- to provide help and support to trainees, as appropriate, where problems arise during the course of training

Signed on: 07/11/2014 15:30
Signed by: Declarations No

I have read this declaration and agree to be bound by it.

---

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 21), 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 ‘Summary’ link.
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.
View and release PSQ

After a valid review has been created (see page 21), 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.
   Select the correct review period using the drop-down box and then click on ‘PSQ’.

3. Click on the ‘Summary’ link (a minimum of 40 forms need to have been submitted and summarised in the site).
4. You can now view a summary report of the PSQ responses before releasing it.
5. Scroll to the bottom and add any comments you wish to make. Please note that these comments will be visible to the trainee.
6. 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 capability

Educational Supervisors are responsible for rating trainees against the 13 capability 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 capabilities.

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 ‘Capability Areas – Educational Supervisor’ section and click on the ‘edit’ link to the right.
6. Rate the capability using the drop-down box.
7. Add any comments you wish to make.
8. Tag up to three additional items of evidence to support your comments.
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).
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 15:00-16:00 when the Helpdesk is closed for brief training)