THE ePORTFOLIO FOR GP SPECIALTY TRAINING

A GUIDE FOR TRAINERS AND SUPERVISORS

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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: http://www.rcgp.org.uk/training-exams/mrcgp-trainee-eportfolio.aspx
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 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 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’.

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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.
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 show on the welcome page. To select a trainee, click on their name and their dashboard will be displayed. The side bar will always show your currently selected trainee. You can change the current 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.

You are also able to see which declarations your trainee has signed in previous posts, by clicking on ‘Historical Declarations’. 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 added 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 using the drop-down option.

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 a learning log entry
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 log’s title to open it.

4. You can mark the entry as read by clicking on ‘Mark as Read/Lock’ at the top of the screen.
5. 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 competency area and shows meaningful reflection. Validation does not imply that competence has been achieved. This function can also be used to add or 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.

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).
- If a Trainee has validated logs against both versions of curriculum, a following link will be visible: ‘Expand Curriculum Statement Headings 2010’. Clicking on this link will display a second curriculum statement headings summary table, which shows log entries linked to the previous headings.
Personal Development Plan

Functions Available
• View a 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 display above the table.

As a Trainer, the personal development plan section is only available to you for viewing.

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Learning Objectives</th>
<th>Target Date</th>
<th>Action Plan</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>24/10/2014</td>
<td>Here is the title (from log entry)</td>
<td>01/10/2014</td>
<td>Here is the title</td>
<td></td>
</tr>
<tr>
<td>18/02/2014</td>
<td>Here is the title (from log entry)</td>
<td>18/02/2014</td>
<td>Here is the title (Time Scale: )</td>
<td></td>
</tr>
<tr>
<td>02/12/2014</td>
<td>Telephone consulting and triage To..</td>
<td>02/12/2014</td>
<td>Initially sit on morning telephone.</td>
<td></td>
</tr>
<tr>
<td>27/09/2014</td>
<td>Text1 (From log entry)</td>
<td>27/09/2014</td>
<td>Text6 (From log entry) (Time Scale: )</td>
<td></td>
</tr>
<tr>
<td>07/08/2014</td>
<td>I need to learn more about what..</td>
<td>07/08/2014</td>
<td>Read local guidelines on referral to..</td>
<td>✔️</td>
</tr>
</tbody>
</table>
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

View Submissions information

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 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 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 at 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. Please see the review date section on page 23.
Complete new Submissions

As a Trainer you can complete new submissions for MiniCEX, CEPS, CbD, COT, Audio-COT and CSR. 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 information.
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.

![Posts Table]

**Skills Log**

Please note that the skills log is only available in a ‘read only’ format.

The read-only list of skills is split into three sections: Mandatory, Optional and Other (previously foundation). The ‘DOPS Present’ column shows the number of DOPS submitted for that skill. If you wish to view the assessments 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 (this is read-only and cannot be updated by the trainees).

**Curriculum Coverage**

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.

![Curriculum Coverage 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 title of the log entry to review and validate. For more information on the shared entries, please see page 12.

**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 don’t fit easily anywhere else or additional information you feel is important that you can’t 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 28.

<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>View</td>
</tr>
<tr>
<td>Has met out of hours session requirements</td>
<td>Not met</td>
<td></td>
<td>No</td>
<td>View</td>
</tr>
<tr>
<td>Safeguarding children</td>
<td>Not met</td>
<td></td>
<td>No</td>
<td>View</td>
</tr>
<tr>
<td>Reviews</td>
<td>Most recent STL-6</td>
<td>01/01/2017</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>ARCPs</td>
<td></td>
<td></td>
<td>View</td>
<td></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
- Curriculum Coverage
- Trainee Self-rating
- Professional Competences

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.

Record new review

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.

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’. Note: you can’t create or edit a review until the Educational Agreement has been countersigned.

2. The Setup page will appear. 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 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 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 six-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 or edit each section at your convenience, as opposed to completing the review in one sitting.

Review feedback

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

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.

<table>
<thead>
<tr>
<th>Curriculum Coverage Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>How has the curriculum coverage developed since the last review?: *</td>
</tr>
<tr>
<td>Please comment on the curriculum coverage in relation to the stage of training and current post: *</td>
</tr>
<tr>
<td>On which areas of the curriculum does the trainee now need to focus their attention before their next review?: *</td>
</tr>
</tbody>
</table>

Skills log

The skills log tab shows a read-only summary of the 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.

**Competence Areas**

**Assessment against the Professional Competence Areas – Trainee Self-rating**

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.
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.

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.
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 five 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.

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 Agreed Actions section. This section allows the Educational Supervisor to edit any suggested actions and add up to two further actions, after the discussion with the trainee. All the actions will then be summarised in a single table against the competency headings, producing a succinct plan for the trainee to use.
**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. You can also outline an agreed action plan for the next review.

<table>
<thead>
<tr>
<th>Quality of Evidence Presented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please comment on the range and quality of the evidence presented by the trainee:</td>
</tr>
<tr>
<td>Please comment on the degree of meaningful reflection shown in the learning log &amp; FDP entries:</td>
</tr>
<tr>
<td>How can the trainee improve the quality of evidence presented before their next review?</td>
</tr>
</tbody>
</table>

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

**Clinical Examination and Procedural Skills**

Are there any concerns about the trainees’ clinical examination or procedural skills? If the answer is yes, please expand on the concerns and give an outline of the plan the trainee needs to follow for these to be rectified.

Has the trainee demonstrated progression in their Clinical Examination and Procedural Skills, commensurate with their stage of training, during the period under assessment? Please comment specifically on breast, rectal, prostate and male and female genital examinations.

Is the trainee competent in breast, rectal, prostate, and male and female genital examinations? Please refer to specific evidence including Learning Log entries, CEPS, COTS and CBIs etc.

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

**Revalidation: Details of Concerns/Investigations**

Are you aware if this trainee has been involved in any conduct or Serious Untoward Incidents / Significant Event Investigation or named in any complaint?

If yes, are you aware if it has / these have been resolved satisfactorily with no unresolved concerns about this trainee’s fitness to practice or conduct?

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 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

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, Safeguarding children and CPR/AED requirements. This only needs to be at the **FINAL REVIEW**. Marking the tick boxes will update the ‘progress to certification’ page once the final review is submitted.

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.

All three 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 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.

**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.
Trainer review functions

Trainers can 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.
Curriculum documents

Functions Available
- View Curriculum Documents

This section is an information source for your curriculum documents and competence areas outlined for the Workplace Based Assessments.

To access this, click on 'Resources' in the top-right area of the website, and then click 'Curriculum'. Finally, click one of the links to access the information.

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 Trainee's 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 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.

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

Functions Available
- View FAQs
- View Help Files

Legals FAQs Resources Contact Us RCGP Main Website

* 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. Supervisions, Trainers and Posts - How do I add them?
09. Supervisions and Trainers - 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?

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:  
Search

These help files may contain extra information in the form of PowerPoint slides, word documents, pdfs or pictures.
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: 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 this link to read and sign the Agreement.

<table>
<thead>
<tr>
<th>Declaration</th>
<th>Signed By</th>
<th>Signed</th>
<th>Countersigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proctor: Professional Obligations</td>
<td>Trainee</td>
<td></td>
<td>Not required</td>
</tr>
<tr>
<td>Health: Professional Obligations</td>
<td>Trainee</td>
<td></td>
<td>Not required</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 the training programme provided meets the requirements of a Certificate of Completion of Training (unless otherwise specifically indicated)
- to ensure that educational supervision is provided throughout the three-year programme from general practice
- 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 22), 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 22), 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 will be visible to 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.
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).
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)