The ePortfolio for GP Speciality Training (including WPBA guidance)
A guide for Trainees

Updated October 2019
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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.

The second section provides guidance for proceeding through MRCGP using ePortfolio. Its aim is to make MRCGP easier to follow.

If you need assistance with navigation, please refer to the first section. If you need help or assistance in how to use the system within a wider context, please refer to the second.

This guide has been updated in October 2019.

Further information

For more information on the MRCGP and the latest updates for the ePortfolio, please visit: www.rcgp.org.uk/tep
Section I: the ePortfolio

Login and home page

As a Trainee, you log in to the ePortfolio using your RCGP username and password, created during your initial registration. To log in, go to https://trainee.gpeportfolio.rcgp.org.uk/ and click the 'Login' button under 'Trainees'.

Please note that the password is case-sensitive. If you have forgotten your password, please use the password recovery available in My RCGP area of the website. You can find it at the following web link: https://rcgpportal.force.com/CPBase__forgot_password. If you require further assistance, please contact Login Support on 020 3188 7666 or via email login@rcgp.org.uk.

Once you have logged in to ePortfolio, you will get to the dashboard. The column on the left and shortcuts on the folder icons allow you to navigate through the system.
Declarations and agreements

There are declarations and agreements that require an electronic signature from you to verify that you will abide to the agreements set. One of these, the Educational Agreement, also needs to be countersigned by your Educational Supervisor. You’ll be asked to sign these when you first log in. Alternatively, from the homepage, click on 'Declarations' to open the window shown.

1. To sign the declaration, select the one you wish to sign by clicking 'sign'.
2. A new screen will show the declaration.
3. Click the 'sign' button at the bottom of the box.
4. You will be returned to the declarations and agreements screen and the signed box will now have the time and date stamp for the signature.
5. You will need to sign the declarations as follows;
   a. ‘Probity: Professional Obligations’ and ‘Health: Professional Obligations’ need to be signed at the start of training. You will not be able to enter Learning Log entries without signing these.
   b. The Educational Agreement needs to be signed at the start of your Training in a Deanery. You will not be able to enter Learning Log entries without signing this. If you change Deaneries, this will need to be re-signed.
   c. ‘Probity: Convictions and disciplinary actions’ and 'Health: Regulatory and voluntary proceedings' must be signed for each review. If your Educational Supervisor has not created the current review, then you will not have the option to sign these two. If there is a reason where you cannot directly accept these, there is an option to indicate that you have made your Deanery aware of this.
6. You are also able to view declarations that have been signed in previous reviews, or under the old system of declarations by post, by clicking on 'Historical Declarations'. These are for reference only and if a declaration was not signed during a review, it cannot be signed later.
Personal details

The Personal Details section contains information such as your address, email, phone numbers and login details. You can also view your National Training number and your Route to Certify here. To access this information, select 'Personal Details' on the left toolbar (Section shown below).

If you notice that any of your personal information is incorrect, please login to the My RCGP to correct it. This will automatically update the ePortfolio.

Details, including your password, cannot be changed via this screen. They must be changed via the My RCGP: [www.rcgp.org.uk/my-rcgp/login.aspx](http://www.rcgp.org.uk/my-rcgp/login.aspx)
**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.

1. 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.

2. 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.

3. 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.

4. 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'.

5. 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.

6. 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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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.
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 educational activities

There are many educational activities for trainees. We will look at each of these in detail. Please note that information contained in your ePortfolio account can be viewed by administrators from your Deanery as well as your current trainer, educational supervisor or Clinical Supervisor; only the messages and learning log are kept private (unless otherwise selected). It is your choice whether you want them to see your learning log entries, but please note that they can only feedback on your entries and validate the competences if they are shared.

Learning log

The learning log allows you to record a wide range of learning opportunities that will arise during your period of training. There are different learning log types you can use:

- Clinical Encounter
- Professional Conversation
- Clinical Examination and Procedural Skills
- Tutorial
- Reading
- Course/Certificate
- Lecture/Seminar
- Out of Hours Session
Add new learning log entry

To add a new entry, follow the steps shown below.

1. At the top of the screen, click 'New Learning Log' and select the type of log you would like to create, then click 'next'. For demonstration purposes, we will create a 'Clinical Encounter'.

2. Next you will see a message box appear asking you to make sure you are complying with the Data Protection Act; names of patients or staff should not be used in any log entry. Click 'ok'.

3. Fill in the information as required. There is no word limit so you can provide as much information as you wish. You can save the entry at any time as long as each mandatory field (indicated by *) contains text.

4. When you’ve finished writing, click 'Continue'.

5. Once you have saved the log, you will be presented with a summary of your log showing all the information.

6. Now click 'select descriptors' to choose the clinical experience groups (maximum of two) under which this clinical encounter would feature. Tick the boxes next to the relevant groups and click 'save' at the bottom.
Edit an existing learning log entry

If you have already created a Learning Log and wish to make amendments to it, follow the steps below. Please note that logs cannot be edited once they have been marked as 'read' by your Supervisor/Trainer.

1. Click on 'Learning Log' on the left menu.
2. Use the search options to find the entry you wish to amend.
3. Click the log’s title to open it.
4. Click on ‘Edit log’ at the top of the screen
5. Make any changes to the record that you require and click on ‘Save’ or ‘Continue’.

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 default number from the drop down. You can switch between each page by using the page number links.
7. Should you require a copy of your learning logs, use the 'Export All' or 'Export Selection' button to download a PDF file containing exported logs.

Attach evidence

If the learning log has already been created and you wish to attach evidence that you may have gathered, follow the steps shown below.

1. Click on 'Learning Log’ on the left menu.
2. Use the search options to find the entry you wish to attach evidence to.
3. Click the log’s title to open it.
4. Scroll down to the bottom of the screen and you will see the ‘Attachments’ section. Click ‘New Attachment’.
6. You can choose to either upload a new supporting file to the entry, attach a web link (click the ‘Upload New Document’ tab) or link to an existing item in your personal library. You have a total allocated storage space of 50Mb, so it is worth considering carefully what files you want to upload.
7. To upload a file, locate it using the browse button and then click ‘save’. Please note, there is a 5Mb limit to the attachment. Most popular document and image file types are supported.
8. To attach a web link, enter the full path of the link in the ‘enter a web link’ box and click ‘save’.

**Share or unshared a log entry**

When you first create a log entry, it will be always private. You may share a log entry with your Trainer and Supervisor (and anyone else who has access to your ePortfolio) if you wish. To share a log entry, follow the steps outlined below:

1. Click on ‘Learning Log’ on the left menu.
2. You will see all the logs you have created.
3. Use the search options to find the entry you wish to edit
4. Click the log’s title to open it.
5. Click ‘Share Log’. You will be asked to confirm to proceed with this action. Click ‘ok’. The entry is now shared, and a timestamp is inserted into the record. To undo, click ‘unshare log’.

On viewing a shared entry, your Educational Supervisor or Trainer may add a comment. They may also choose to validate the entry as a piece of contributory evidence towards Workplace Based Assessment. In this case, your Educational Supervisor/Trainer will assign a professional competence area to the entry. They can also mark the entry as ‘read’ and lock it. Once the entry is marked as ‘read’ by the Educational Supervisor/Trainer, the log is locked and cannot be edited further. When a log is marked as ‘read’, you will see a tick in the ‘read’ column. Further additions to a locked entry will need to be made as ‘comments’ or a new entry can be created as necessary.

Coverage of clinical experience groups for shared entries will be visible in a table on the ‘Review Preparation’ page.
Add learning log entry to PDP

If you would like a created learning log entry to be attached to your Personal Development Plan, follow the steps below. For more information on the PDP, go to page 15.

Please note: To send a Learning Log entry to the PDP it must have been ‘shared’ and you must have filled in the sections ‘What further learning needs did you identify?’ and ‘How and when will you address these?’ (Not all categories of Learning Log have these fields available – in such instances a manual PDP entry will need to be made instead.)

1. Click on ‘Learning Log’ on the left menu.
2. You will see the logs you have created.
3. Use the search options to find the entry you wish to edit.
4. Click the log’s title to open it.
5. Click on ‘Send to PDP’ at the top of the screen.

6. Complete the information in the PDP as required and click ‘Save’.
7. The entry will now be added to your PDP.

Making comments on learning log entries

All Learning Log Entries allow you to enter comments about the entry. Most commonly, your Trainer or Educational Supervisor will make a comment on your Log Entry. You then have the option to respond to those comments, thus creating a dialogue. These comments will appear in your Learning Log entry with the name of the comment maker next to each.

To make a comment on a Learning Log Entry:

1. Click on the ‘New Comment’ button.
2. Enter the comment you wish to make and click ‘Add Comment’.

It is also possible to edit a previous comment.
Personal Development Plan (PDP)

Functions Available

- Add new PDP entry
- View and edit an existing PDP entry
- Attach evidence
- Create a Learning Log entry from the PDP

Your PDP is entirely your responsibility although it should be discussed with your supervisors. It is the place where you record your longer-term learning. It can be derived from learning events, from systems such as PUNs and DENs, from personal reflection, guidance from supervisors or health policy statements. As you are in training the number of items that you might record will be large so a conversation with your supervisors can help you to know how to prioritise. The PDP is a fundamental part of your NHS appraisal.

The personal development plan allows you to set objectives for yourself that will be relevant to your continuing professional development.

You can assign timescales to your objectives and they can be marked as achieved once completed.

The personal development plan can be viewed by your supervisors and trainers.

As with the learning log entries, you can add attachments to your PDP entry.

If you wish to delete a PDP entry (e.g. one entered by accident), you can click on the rubbish bin icon to do so.

Once marked as Achieved, an entry can no longer be edited, but can be deleted if needed.
Add new PDP entry

To add a new PDP entry, follow the steps outlined below.

1. Click on ‘PDP’ on the left menu.
2. At the top of the Personal Development Plan page, click on ‘Add New’.
3. This will open the entry for you to fill the information in.
4. Once you have completed the form, click ‘Save’

View and edit an existing PDP

If you would like to amend a current PDP entry or maybe change its status to ‘achieved’ (entry must be an ‘active’ one), follow the steps below.

1. Click on ‘PDP’ on the left menu.
2. Select the entry that you wish to amend by clicking on the edit icon.
3. This will open the entry for you to edit the information.
4. If you would like to mark the entry as achieved, tick the box at the bottom of the entry – please note that you will no longer be able to edit entries marked as achieved.

Add PDP entry to learning log

If you would like a use a PDP entry to generate a Learning Log, follow the steps below.

Please note: In order to send a PDP entry to the Learning Log, you must have filled in the Sections on ‘What further learning needs did you identify?’ and ‘How and when will you address these?’ (Not all categories of Learning Log have these fields available – in such instances, you will need to create a manual entry.)
1. Click on ‘PDP’ in the left menu.
2. You will see all the entries you have created.
3. When you have found the entry you wish to use, click the 'Send To log' link next to it.
4. The form will appear to create the log. Select from the drop-down the appropriate Learning Log Type and ensure you enter a ‘Subject title’
5. Click on the 'Save' button at the bottom.
6. The entry will now be added to your Learning Log.

Please note – it is only possible to generate one Learning Log per PDP entry. Additional Learning Logs related to the same PDP entry will need to be created manually in the usual way.
The evidence section of the ePortfolio allows you to see the completed formal assessments that make up the minimum evidence required for Workplace Based Assessment. Every six months you will be required to complete a specific number of different assessments, based on your stage in training and your post. Towards the end of every six months your Educational Supervisor will conduct a review for you within the ePortfolio. This review will be informed by the evidence collected through the WPBA tools, augmented by any naturally occurring evidence such as Learning Log entries etc.

These assessments include:

- Case-based Discussion (CbD)
- Consultation Observation Tool (COT) and Audio-COT (in primary care)
- Clinical Examination and Procedural Skills (CEPS)
- Clinical Evaluation Exercise (MiniCEX) (in secondary care)
- Clinical Supervisors Reports (CSR)
- Multi-Source Feedback (MSF)
- Patient Satisfaction Questionnaire (PSQ) (in primary care)
- Prescribing assessment
These are not pass or fail assessments, they are formative; the evidence may be insufficient or inadequate, particularly in the early stages of training. The picture of your competence can be built up as more evidence is fed into the system.

Information on the minimum requirements can be found on the RCGP website: www.rcgp.org.uk/gp-training-and-exams/mrcgp-workplace-based-assessment-wpba.aspx

Within the ePortfolio, these reviews are organised based on ST year and the number of reviews conducted in that year. For example, standard full-time training over three years would give you the following set of reviews:

- ST1-1
- ST1-2
- ST2-1
- ST2-2
- ST3-1
- ST3-2

However, during your training there may be instances where extra reviews are needed in an ST year. For example, if you were on maternity leave during your ST2 year, you may need extra reviews, as your ST2 year will take longer to complete. Also, less than full-time trainees will require extra reviews, as the ST year will be longer than 12 months. Reviews are still required every six months regardless of whether a Trainee is full-time or less than full-time. In these cases, your Educational Supervisor will create the extra reviews as needed. For example, a trainee who undertakes a three-year training programme at 50% would give you the following set of reviews:

- ST1-1
- ST1-2
- ST1-3
- ST1-4
- ST2-1
- ST2-2
- ST2-3
- ST2-4
- ST3-1
- ST3-2
- ST3-3
- ST3-4

For navigating the Evidence section within the ePortfolio, you have two drop-down menus – one for ST year and one for Review Number. The ST year gives you the options from ST1-ST5.

The Review Number will give you the numbers corresponding to reviews created for you by your Educational Supervisor.
Each time your Educational Supervisor creates a review for you, the number will automatically increase by one. In this drop-down menu, you will notice numbers with ‘(not created)’ appearing next to them. These are placeholders for where your Educational Supervisor has not created a review of this type for you. For example, when first starting ST1, and looking at the Evidence section for the first time, a trainee will only see ‘1 (not created)’ in this drop-down menu. This is because no reviews have been created for them yet. Once their first review has been created, they should be able to see ‘1’ and ‘2 (not created)’.

The system will automatically show your current ST year and Review Number based on your post and the reviews created for you by your Educational Supervisor.

To select a different review period, first change the ST year drop down menu, then the review number. There may be slight variations to the minimum requirements depending on if you are a less than full-time trainee, or if you are undertaking a period of extended training. The ‘minimum’ header has a link explaining the minimums for less than full-time and full-time trainees. If you have any queries about this, please check with your Deanery/LETB.

View assessment requirements

Here you can view information on your current assessments; the completed column shows the total that have been submitted.
You will currently be in summary mode. To have 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 as an example.

By default, you will see the evidence collected for the current review period. To view information on other review periods, select them.

**Naturally Occurring Evidence**

It is the nature of General Practice that you will be able to demonstrate competencies outside of the formalised assessments; teaching would be one of these. In these circumstances you can ask your trainer/supervisor to validate such competencies through the learning log as Naturally Occurring Evidence.

**Preview blank forms**

You can preview a blank form for each assessment. To preview a blank form, simply click the ‘Preview’ link on each assessment tab.

**Sending an assessment request**

You can request that an assessor completes a form for you from the assessment tab. If you wish to make a request for an assessor to complete a form, click on the ‘Produce Ticket Code’.

In this case, a screen will be displayed entitled ‘CEPS Request’. You have three ways of sending this to an assessor.
1. Click on the 'Notify Assessors' link. This will take you to a form where you can enter the name and email address of multiple assessors. You can also select a checkbox to add your own message to the assessment invitation. To send the assessment invitation, click 'send'. This will send instructions to specified assessors by email.

2. Copy the instructions from the page (including the ticket code at the top), paste it into your preferred email client or app and send it to your assessor.

3. Print out the page and give it to your assessor.

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**Posts information**

Clicking on ‘Posts’ in the left-hand menu allows you to see your current and future posts within the ePortfolio. You can also see evidence submitted during each post by clicking 'View' in the ‘Assessments’ column.

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It is important that your post details are correct, because they appear on you Annual Review of Competence Progression (ARCP) forms, which are a statutory requirement for Certification purposes at the end of your training.

Any inaccuracies may delay the Certification Process, and you will not be able to work without your CCT or CEGPR. Please check your post details carefully and if you notice any errors, please contact your Deanery/LETB who will correct them for you.
Review preparation

The review preparation page gives you an overview of Educational Supervisor’s Reviews (ESR), including the stages required for next review. It also lists preparation you have already done. Note: the individual tabs only appear on this page if you have a current ESR (review with an end date that is greater than ‘today’). Ask your ES to set one up as appropriate.

Please also see page 27 and 40 for more information about reviews.

The stages for preparation are:

- **Clinical Experience Groups Coverage:** You can view how many log entries are linked to clinical experience groups. You can also open a link against each clinical experience group to view the associated logs.

  The new curriculum was published in August 2019 and the ePortfolio was updated in September 2019 to reflect these changes – if you would like to see entries linked to the previous curriculum, you can do this by clicking a link on the bottom of this page, titled ‘Curriculum Statement Headings 2013-2018’.

- **Skills Log:** the read-only skills log is shown here. It was previously used for DOPS self-assessment. DOPS have been replaced by Clinical Examination and Procedural Skills (CEPS).

- **Professional Capability Areas:** Against each capability you can view how many logs and assessments have been recorded that link to this – you can click the link to view the individual records.

- **ES Feedback:** Your supervisor’s ratings from the previous review is shown on this tab.

- **Self-Rating:** You will need to complete the self-rating against the 13 capability areas on this tab. These entries are review specific and must be completed fully for each one.
You will find the following sections in the self-rating:

- **Action Plan:** The trainee needs to suggest at least three actions per review. These should be discussed with the supervisor who can also edit them before they are finalised. All actions added by the trainee, and then agreed with the supervisor, will be summarised in a single table against the capability headings, producing a succinct plan for the trainee to use.

- **Proposed PDPs:** The trainee will be expected to propose PDP areas for the next six months (or year if they are approaching CCT and their next appraisal will be as a qualified GP). The ES will help to improve, make SMART and finalise the suggested PDP areas. The trainee will still be expected to produce other entries to reflect their learning needs throughout their training.

- **Declarations:** You need to sign off two declarations for each review period: "Probity: Convictions and disciplinary actions" and "Health: Regulatory and voluntary proceedings". You should only select that you have demonstrated competence in safeguarding children at level three at your final review. Please make sure that you read the declarations carefully as they cannot be changed once you sign them.

Once you are satisfied with your comments, you need to click the 'Submit' button to complete your self-rating. Please note once you submit the self-rating, it can no longer be edited. After this, any further comments will need to be entered as reflective Learning Log entries.
Educators' notes

Functions Available

- View notes made within your ePortfolio by Trainers, Supervisors and Deanery Assessment Leads/Administrators

This section allows for Trainers, Clinical Supervisors, Educational Supervisors and Deanery Assessment Leads/Administrators to enter comments in your ePortfolio. This could include a note about interim meetings that don’t fit easily anywhere else or additional information they feel is important that they can’t enter anywhere else. Each entry will be date stamped, with the name of the person who entered it and a subject field. You will be able to view everything that is entered in this section, but will only be able to respond to it through your learning log. It will also be available to the ARCP Panels.

The date of the latest entry will be displayed in your dashboard.
Progress to certification

Functions Available

- View AKT status & results
- View CSA status & results
- View CPR achievement
- View OOH achievement
- View safeguarding children achievement
- View completed reviews
- View completed ARCPs
- Apply for CCT (at completion of training)

View WPBA components

The Progress to Certification page keeps track of the various components that make up MRCGP. As you progress through your training and complete various components, they will appear here.

You can see exam bookings and results when they are published by clicking ‘View’. Clicking on the AKT and CSA ‘View’ will take you straight to a summary including the times you have sat them. You can then ‘View’ more details on the individual results.

```
<table>
<thead>
<tr>
<th>Date Of Exam</th>
<th>Results</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/04/2010</td>
<td>Pass</td>
<td>View</td>
</tr>
</tbody>
</table>
```

Clicking on Reviews will bring up a list of your reviews and clicking on ARCP will bring up your completed ARCPs. These will be looked at in the next sections.
Applying for CCT

On completion of your training programme, you will then have the option to electronically apply for your CCT. This button will not appear in the Progress to Certification area until you have completed all MRCGP components listed above and had your Final ST3 ARCP marked as complete.

Important – the ‘apply for CCT’ option will only appear after the following has been recorded in the ePortfolio: AKT pass; CSA pass; ‘Valid CPR and AED certificate’, ‘Out of Hours’, and ‘Safeguarding children’ requirements marked as met in the final ESR by the ES; final ARCP rated Outcome 6: ‘Recommendation for Completion of Training’ and signed off.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Met</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has met out of hours session</td>
<td></td>
<td></td>
</tr>
<tr>
<td>requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safeguarding children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reviews</td>
<td>Most recent ST3-3</td>
<td>14/12/2018</td>
</tr>
<tr>
<td>ARCPs</td>
<td>Most recent ST3</td>
<td>19/12/2018</td>
</tr>
</tbody>
</table>

After applying, you will see a confirmation with a date stamp.

Reviews

As part of your training, your Educational Supervisor will conduct six-monthly reviews of your progress. These are not governed by Post, but by every six months in training. When your Educational Supervisor has completed a review for you, a notification will appear on your dashboard:

Clicking on this link or directly going to the "Review Preparation" page will bring you to the reviews list. On the “Review Preparation” page, click “View” to bring up the review in detail.

The review is broken up into four pages that can be navigated through at the bottom or top of the page.

On the last page (‘Workplace Based Assessment’) at the bottom you will see the ‘Accept Review’ button. You should only click on this if you are happy that all the details of the review are correct. Trainees are asked to self-rate against the thirteen professional capability areas and the review cannot be completed until the self-rating has been completed and
submitted. In addition, the 'Declarations for Probity: Convictions and disciplinary actions’ and ‘Health: Regulatory and voluntary proceedings’ need to have been signed.

**Once your review is completed and submitted by your Educational Supervisor, you will be able to sign the review. If you agree with it, mark YES. If you don't, mark NO and a ‘Comments’ box will appear for you to state why this is the case. Once you have signed off the review, it cannot be edited further.**

![Image of ePortfolio review process]

<table>
<thead>
<tr>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation of Educational Supervisor:</td>
</tr>
<tr>
<td>Recommendation comments and concerns:</td>
</tr>
<tr>
<td>I confirm this is an accurate description/summary of this trainee’s learning portfolio, covering the time period from 27/07/2017 to 26/01/2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electronic Submission by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michele Yuen ES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submission Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 October 2017 16:01</td>
</tr>
</tbody>
</table>

**Agree with Review**

This review has now been released. Please select if you agree with the Review.

I agree with this review  ☐ Yes ☐ No

Comments

Submit
Capability Areas

All pages are linked to each other and reflect the current status of your ePortfolio.

Clinical Experience Groups

This is the same Panel view your Deanery will be looking at when they conduct your ARCP at the end of each year.

Workplace Based Assessment

Forms submitted between 12/07/2019 and 13/08/2019

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSQ (if not yet completed in ST1)</td>
<td>0</td>
</tr>
<tr>
<td>miniCEX</td>
<td>0</td>
</tr>
<tr>
<td>OiD</td>
<td>0</td>
</tr>
<tr>
<td>COT</td>
<td>0</td>
</tr>
<tr>
<td>Audio-COT</td>
<td>0</td>
</tr>
<tr>
<td>CEPS (as appropriate)</td>
<td>0</td>
</tr>
<tr>
<td>Prescribing</td>
<td>0</td>
</tr>
</tbody>
</table>
Annual Review of Competence Progression (ARCP)

At the end of each training year, you will undergo an ARCP conducted by your Deanery/LETB ARCP Panel. This is based on your two reviews conducted during that year by your Educational Supervisor. Once the Deanery Panel has completed your ARCP, you will see a notification in your ePortfolio. Clicking on it will bring you to your ARCP. Click on ‘View’ to open it.

After you look through this and have ensured the details are correct, you need to click on the ‘ARCP Sign-Off’ button at the bottom.

Once you have accepted this, it will be viewable as a PDF file under Progress to Certification.

If the outcome from your ARCP panel is that your progress is unsatisfactory and you have been recommended further training or assessment, it is important that you sign the ARCP form to accept this outcome. Once the additional training requirements have been met, a second ARCP will need to be produced by your Deanery/LETB, but this cannot be generated until the first one has been accepted.

If you notice any errors in the ARCP form, such as if your name is spelt wrongly, your post dates are inaccurate, or your GMC number is wrong, please contact your Deanery/LETB to have these details corrected before you accept the ARCP.

Any inaccuracies could delay your CCT application at the end of your training.
Personal library

Functions Available

- View items in the personal library

The personal library section contains all attachments that you have imported into ePortfolio through the logs. You can also attach other files directly through the personal library by using the 'Add New' option at the bottom of the screen.

Personal library Storage is limited to 50MB; it may be necessary to manage these files should the storage become full. It's also possible to upload links to external sites and files – however we recommend that you check the IT policy of your Deanery/LETB before using external websites as some Deaneries may not allow their use.

The maximum file size that can be uploaded at one time is 5MB.
Downloads

Functions Available

- Save sections of ePortfolio in a variety of formats
- Print of sections of ePortfolio

Every page within the ePortfolio can be printed off using the ‘Print-friendly Version’ link at the top right of each page. The download section allows for saving specific parts of the ePortfolio for your own personal use.

The options are:

- Trainee Details and Posts
- ARCP outcomes
- PDP
- Educators Notes
- Reviews
- ARCPs
- Skills Log – this link is visible only to Trainees who have previously used the skills log during their training. The skills log is available in a ‘read-only’ format and cannot be updated.

By clicking on these, you will either open that item, or a sub menu of items to choose from. You will then have the option to ‘export’ the records in pdf format.
Frequently Asked Questions (FAQs) and help

**Functions Available**

- View FAQs
- View help files
- View resources

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.
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: Make the most of WPBA and the ePortfolio

Workplace Based Assessment (WPBA) requires trainees to keep a training record and learning log, housed in the ePortfolio (TeP). Within the TeP, trainees log their training and map their learning experiences to clinical experience groups and capability areas. The Educational Supervisor reviews that log, assesses and agrees capability coverage and validates them. This is recorded in the TeP and a picture of the learning journey and progression of capability builds up. The more evidence that is presented the more clarity is added to that picture and the final judgment becomes more robust. Assessors make judgements of capability progression throughout the training programme. In this context capability is defined as competent for licensing and independent practice. Therefore, a grading of ‘NFD’ (needs further development) is not a negative judgment but allows formative feedback to help develop capability.

How to demonstrate capability and gather evidence

WPBA provides a number of tools and assessments that will test across the capability framework, each covering different areas. Using the range of tools and a reflective learning log help provide a balanced comprehensive portfolio.

How to get the best out of WPBA

- Planning; the suggested schedule of assessments defines the minimum evidence required for each staged review and that informs the judgement of competence progression.
- Discuss learning needs with educational supervisors early in the programme, be aware of what assessments are needed and schedule them; reflecting on experiences with patients and colleagues, practising and developing skills. Review progress regularly, it is far more difficult to cram assessments in to the last few weeks of posts. Planning one a month is more realistic and gives greater opportunity for formative development.
- Use the assessments formatively; a case-based discussion done early in ST1 is unlikely to show competence or excellence in the desired capabilities but it gives a snapshot of performance at that stage. Assessors give feedback on how to improve and develop.
- Look for learning opportunities. The contextual nature of WPBA provides rich learning opportunities. Keeping a reflective diary helps capture that information and the competences it tests can be reviewed and validated by the trainer during ‘professional conversations’. It is important to be discriminating in the learning log entries. Record personal reflections, not documents and handouts. Critical reflection on how knowledge has been applied to solve a problem gives information about higher cognitive ability of understanding; synthesis and evaluation gives the Educational Supervisor a clearer understanding of how trainees are progressing than purely descriptive entries.
- WPBA is not just about COTs and CBDs; evidence from other activities such as audit,
critical appraisal and significant event analysis can better test some of those difficult professionalism competence areas. The naturally occurring evidence and learning log are currently under-used and help to provide a balanced portfolio of evidence for panels to assess.

Learning log

The learning log is intended to be a personal log of your experiences. You control what goes into this and what items you choose to share.

There is no minimum number of learning log entries required for completion of training. However, there needs to be sufficient evidence of balanced curriculum and capability coverage; this will of course be contextual depending on your current post. Sharing the log entries with your Educational Supervisor at each review can be helpful in tailoring your learning programme to ensure a balanced portfolio of evidence.

The headings are intended to assist you in inputting your entries. However, you shouldn’t get too concerned if you are using the right heading. Make your own judgement about what you feel is correct.

When entering and sharing learning log entries, you should be considering quality over quantity. With entries you share, your Educational Supervisor will be looking at what you have put in, more than how many entries you have shared. The original design of the learning log is to encourage reflective practice on experiences in the workplace, so for example a brief case description, the learning points, referenced to any evidence e.g. NICE guidance, how that improves your management skills and demonstrates that you are learning from your day to day practice. This contributes to the emerging picture of your learning journey developing competence.

It is important to remember that WPBA is essentially a formative developmental process and it is unlikely that you will be judged as competent in the early stages of training, when it is to be expected that many of the assessments are graded ‘needs further development’. This is not a negative judgement but should be supported by feedback from your supervisors to help you develop those skills to achieve competence.

Your Educational Supervisor will have the opportunity to validate entries against capabilities. They will not do this for all entries, only those that show significant hard evidence of a capability.

You do not need to send all Entries to the PDP. Generally, you would only create PDP entries from Log entries where you can look at a specific area upon which to improve.
Under Review Preparation, there is an area for Clinical Experience Groups Coverage. Only shared learning log entries will have their clinical experience groups linked here. This is because this is a public area that your Supervisor and Deanery can see.

### Clinical Experience Groups Coverage

<table>
<thead>
<tr>
<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 18</td>
<td>Q</td>
<td>Q</td>
<td>Q</td>
</tr>
<tr>
<td>2. People with mental health needs (including addictions)</td>
<td>Q</td>
<td>Q</td>
<td>Q</td>
</tr>
<tr>
<td>3. People with long-term conditions and disability</td>
<td>Q</td>
<td>Q</td>
<td>Q</td>
</tr>
<tr>
<td>4. Frail and/or elderly people (including multiple morbidities and care of the dying)</td>
<td>Q</td>
<td>Q</td>
<td>Q</td>
</tr>
<tr>
<td>5. Gender health (Women’s, Men’s and LGBTQI health)</td>
<td>Q</td>
<td>Q</td>
<td>Q</td>
</tr>
</tbody>
</table>

### Evidence

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSF (5 clinicians and 5 non-clinicians if in Primary Care)</td>
<td>0</td>
</tr>
<tr>
<td>PSQ 8 (if in primary care and not yet completed)</td>
<td>0</td>
</tr>
<tr>
<td>miniCEX</td>
<td>0</td>
</tr>
<tr>
<td>CxD</td>
<td>11</td>
</tr>
<tr>
<td>COT</td>
<td>10</td>
</tr>
<tr>
<td>Audio-COT</td>
<td>0</td>
</tr>
<tr>
<td>CSR</td>
<td>0</td>
</tr>
<tr>
<td>CEPS (as appropriate)</td>
<td>0</td>
</tr>
</tbody>
</table>

Through the course of your training, you will complete many assessments that are gathering evidence to build a picture of your fitness to practice. Each review period will have different requirements. For information about minimum requirements, please see the RCGP website. You are encouraged where possible to submit more and indeed your Deanery or Educational Supervisor may ask for more than these. Each review is labelled by ST year and then how many reviews you have had in that year. For a full-time trainee with no breaks, the following is a list of your reviews:

- ST1-1 6 month
- ST1-2 12 month
- ST2-1 18 month
- ST2-2 24 month
- ST3-1 30 month
- ST3-2 Final Review
It may be that you end up having some absence or extended training. If this happens you may have more reviews in an ST year. These will just appear as additional review numbers. For example, a period of extended training in ST2, may have the following reviews:

- ST2-1
- ST2-2
- ST2-3

Your Educational Supervisor will set your Review Dates for you, and this will affect your Review periods. Everything submitted up to a review date will appear in that review and everything afterwards will be applied to the next review. When you have your Review with your Educational Supervisor, if you have outstanding items, you will need them to set the review date to cover this as appropriate.

**Less Than Full-Time Trainees**

Some trainees will be working less than full-time. As such your review structure works a little differently. You are still required to have six-monthly reviews and will have more reviews overall. Please see the link below.

Your reviews will not be labelled differently from full-time trainees. A less than full-time trainee working at 50% would have the following reviews. The labels to the right of them are the names given in the link at the bottom of the screen. The months in brackets are how many months of training you will have completed at this point.

- **ST1-1**  
  First ST1 6 month (6 month)
- **ST1-2**  
  Second ST1 6 month (12 month)
- **ST1-3**  
  Third ST1 6 month (18 month)
- **ST1-4**  
  Final ST1 6 month (24 month)
- **ST2-1**  
  First ST2 6 month (30 month)
- **ST2-2**  
  Second ST2 6 month (36 month)
- **ST2-3**  
  Third ST2 6 month (42 month)
- **ST2-4**  
  Final ST2 6 month (48 month)
- **ST3-1**  
  First ST3 6 month (54 month)
- **ST3-2**  
  Second ST3 6 month (60 month)
- **ST3-3**  
  Third ST3 6 month (66 month)
- **ST3-4**  
  Final ST3 6 month (72 month)

These will need to be set up by your Educational Supervisor.
As with full-time trainees, if you have periods of extended absence from training or extensions of training, then further reviews will take place.

More information for Less Than Full-Time Trainees can be found here:

### How many Reviews and what Evidence do I need?

If you are training at less than full-time, the following may help work out how many reviews you need.

You will need a review every six months.

You will also need a review to mark the end of an ST year. This may cover a period of less than six months. If so, please consult your Deanery as to what evidence they may require.

You will need to complete two rounds of MSF in ST1 and ST3. The MSF should be conducted once in the first half of the ST year and once in the second round of the ST year.

You will need to complete at least one PSQ in ST3, near the end of your ST3 year. If you have a General Practice post outside your ST3 year, you will need to complete an additional PSQ in that post.

There is no minimum number of CEPS to be recorded. Instead, you will be expected to discuss your learning needs during placement planning meetings and to record your plans in the learning log and PDP. The range of examinations and procedures and the number of observations will depend on your particular needs and the professional judgement of your Clinical and Educational Supervisors. However, there are some particular examinations that need to be specifically included. These are breast examinations, rectal and prostate examinations, and the examinations of male and female genitalia. Any examination can be considered intimate by some patients (for instance a competent examination of the eye with an ophthalmoscope) but the examinations listed are those that, due to their particularly intrusive nature, need to be specifically commented on and reflected on during your training.

### Reviews

Every six months, you will have a Review with your Educational Supervisor. They will comment on your areas of training and note how you are doing. They will date this review and this date controls where your evidence will appear.

Prior to having the review, you should look through the section labelled ‘Review Preparation’. The areas here should be considered prior to the review, especially the Self-Rating against the capabilities.

You are expected to rate yourself against these capabilities prior to each review. These
ratings are review specific and provide a snapshot for the relevant stage of your development. When completed they must be submitted using the ‘Complete and Submit’ button, after which they cannot be edited. Previous entries are viewable in historical reviews.

You can also see your Educational Supervisor’s ratings of you in these areas. These too we expect to change as you progress through your training.

When the Educational Supervisor has completed the review, they will click on a Complete and Submit option. This will then share the review with you.

Click on the link in the notification area to go to the review list. The most recent will be at the top. Click on ‘View’ to open the review.

The review is broken up into four pages. You can navigate through these at the bottom of the screen.

This is the view your Deanery ARCP Panel will see as well when reviewing your ePortfolio. On the last page of the review, you have the option to sign it.

Once signed, the review is locked and can be no longer be edited. Therefore, you should check through it carefully to make sure everything is correct. If there are areas that you have queries about, please discuss this with your Educational Supervisor
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)