Wessex Public Health Practitioner Registration Support Scheme

E-Portfolio User Guide for Assessors

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1. Logging in

Accompanying video can be found at:
https://youtu.be/xtfCHK1m0IM

**STEP 1** Type the following address into your website browser and login using the username and password you have been given.
https://system.learningassistant.com/HEWESSEX/

Top tip!
Save this web address to your favourites to make it easy to find.

**STEP 2** Accept the Terms & Conditions.

Top tip!
Use this link to help you if you have forgotten your password.

**STEP 3** Change your password to something secure and memorable. Please note the password is case sensitive.
2. Finding your practitioner

Accompanying video can be found at: https://youtu.be/xftCHK1m0lM?t=45s

**STEP 1a** Find your practitioner
To locate the practitioner’s portfolio, click on the Practitioner Quicklist link in the top menu.

The practitioners allocated to you are listed alphabetically. In addition, new applicants are highlighted with a red asterisk.

There is also a search filter available that can refine the list still further.

**STEP 1b** Click on the practitioner’s name to open their portfolio.

This will open their portfolio at the course folder.
3. Changing your password and uploading your picture

Accompanying video can be found at: https://youtu.be/czlfu7sH5QA?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMCIPj71

As well as being prompted to change your password when you first log in, you have the ability to update it at any time whilst logged in to the e-portfolio system.

**STEP 1a** To change your password, go to the e-portfolio homepage, and click the **Profile Tab**.

**STEP 1b** Click the **Change Password** link and the password change tool will open.

**STEP 1c** Update your password by entering your existing password, followed by your new password and then confirming it.

**STEP 1d** To complete the process click the **Change Password** button.
Learning Assistant also allows the you to add your photo to the e-portfolio.

**STEP 2a** From the same profile tab, click **Change Image**.

This will open a new tool entitled: Change Profile Picture.

**STEP 2b** To upload a photograph click the **Choose File** button and select the photograph you wish to use from your PC.

**STEP 2c** Then click **Upload Profile Picture**.

Once the picture has uploaded, you’ll see a success message and your new picture will show in the box.

When you close the upload photo tool, your new profile picture will appear on your profile tab and on any messages you send via the message centre.
4. Setting up alerts

Accompanying video can be found at: https://youtu.be/CXHQRYrhpW8?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMClPj71

Alerts can be sent to an email address of your choice to prompt you when work has been submitted and awaiting assessment.

**STEP 1** To set up email alerts, go to the e-portfolio homepage, and click the Profile Tab.

**STEP 2a** From here, click the Email Settings link.

This will open the Email Settings window.

**STEP 2b** Fill in the email address you want the alerts to be sent to.
STEP 2c Scroll down and select how often you’d like to receive alerts under the Message Digest section.

The message digest lets you know when your practitioner has sent you a message in the e-portfolio system.

STEP 2d Scroll down to the bottom of the window to the Candidate Submit Digest and select how often you’d like to receive alerts (you’ll notice there are other ‘digests’ in the list - as these are not required they can be left).

By electing to receive an alert, you will receive an email notifying you when any of your practitioners submit any new commentaries or supporting evidence documents for assessment.

Again, it is recommended to click daily. The daily email will contain a list of practitioners who have uploaded new evidence for assessment that day.

STEP 2e Click on Save Changes to confirm your choices.

Once Save Changes has been clicked, a confirmation screen appears and the Alerts have been set up as required.

STEP 2f Click on Close to complete the process.
5. Downloading the assessment log

Accompanying video can be found at: https://youtu.be/lemvouUKzyk?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMCIPj71

One of the real benefits of the e-portfolio is that the Assessment Log is compiled automatically. All that remains is for you to download and review it.

**Step 1a**
From the list choose the Practitioner whose Assessment Log you wish to see.

**Step 1b**
Open their Course Folder by clicking on the tab.

A pop up window will appear asking for permission to download the Assessment Log.

**Step 1c**
Click on the Assessment Log link situated in the top right menu panel.

**Step 1d**
Click Yes to download the Assessment Log PDF to your computer for review.

**Step 1e**
Once downloaded you will see this pop up window confirming the download. Click Close to complete the process.
6. Navigating a practitioner’s course folder

Accompanying video can be found at: https://youtu.be/8PyLNU0DT1g?list=PLi_5bNEZWv_HAtCi1Qajo79BmlMCIPj71

In the e-portfolio, each Practitioner has a Course Folder which displays all 12 standards and their associated indicators. Additional sections are also listed in the Course Folder for: Supporting Documents (for example, a CV and Job Description); as well as any required Application Forms and Contracts.

1a To locate the practitioner’s portfolio, click on the practitioner list link in the top menu and then click on the practitioner you wish to assess.

The practitioner’s e-portfolio will open at the Course Folder page.

You need to assess all the indicators that have the status of “submitted and awaiting review”.

STEP 1b To begin the process of assessment, the assessor clicks on the relevant indicator from the Course Folder.
STEP 1c To open the commentary, the assessor just clicks on the file name. The file will automatically be downloaded to your PC.

STEP 1d Similarly, to open the Evidence, click on evidence file and wait for it to download. Then open the evidence to assess whether it supports the indicator being claimed.

Top tip! All original evidence files are protected. This allows any changing or editing to take place safe in the knowledge that originals will remain unchanged.
Once the Commentaries and Evidence have been reviewed, you can make an Assessment Decision based upon whether the work uploaded adequately meets the indicator being claimed.

For each individual indicator there are four assessment decisions you can select from: **Accept**, **Partially Accept**, **Clarification** or **Resubmission**. It’s up to you to choose the appropriate assessment decision.

**STEP 1a** Select the indicator you wish to assess from your Practitioner’s Course Folder and download it as shown on Page 10.

**STEP 1b** Select the assessment decision you have decided to give the indicator from the four choices available and click the relevant button. Once clicked this will open the Contact Diary window to allow you to explain your decision.

**STEP 1c** First, you should click the Private Box so that your Practitioner cannot see the assessment decision straight away.
**STEP 1d** In the **Actions Box**, you must provide the reasons for your assessment decision.

You can ignore the Next Meeting and Document Upload as they are not relevant to this Scheme.

**STEP 1e** Once your comments are complete click the **Create** button.

**STEP 1f** Click the Close button to complete the process.

The comment will then appear in the Contact Diary.

As well as in the Contact Diary section at the bottom of the indicator in the Course Folder view too.
One of the key techniques that you need to master is the use of the Privacy Box in the Contact Diary. The primary use of the privacy box is to hide assessment feedback until you’re ready to present it to the practitioner.

**STEP 1a** Once you have reviewed a Practitioner’s work and made your assessment decision as shown on Page 11 of this guide, you are strongly advised to tick the Privacy Box in the Contact Diary entry associated with that assessment.

This has two benefits: In the event that the you need to change the assessment decision or edit the comments in the Contact Diary entry, the practitioner will not see any changes. Secondly, the Practitioner will not see any Assessment Decisions or Comments in the Contact Diary until you are ready to feedback to them.
**STEP 1b** To un-tick the privacy box of an indicator you need to locate each in the Contact Diary and click on the edit icon.

**STEP 1c** This will open up the Contact Diary entry for that indicator and from here you can un-tick the privacy box. This allows the practitioner to see all the assessment decisions made and all the feedback provided.

You will now see this reflected in both instances of the Contact Diary: At the bottom of the indicator page and at the bottom of the indicator in the Course Folder view.
9. Changing an assessment decision or editing comments

Accompanying video can be found at:
https://youtu.be/5FSGan6Dqow?list=PLi_5bNEZWv_HATCI1AQjpo79BmlMCIpJ71

There may be times when you need to change your comments for an assessment decision or even change the assessment decision entirely. The process of doing this is simple providing the Privacy Box was clicked in the Contact Diary entry for the previous assessment decision.

Please note: If the options discussed for editing comments or updating assessment decisions aren’t available, it may be that the time limit on allowing editing of the entry has passed or the Privacy Box wasn’t clicked on the original assessment decision. In this case, please contact the e-portfolio support team for further advice on how to proceed.

**STEP 1a** To edit the comments on a previous assessment decision, go to the indicator to be updated and scroll down to the Contact Diary section.

**STEP 1b** Click the **Edit the Contact Diary Entry** icon next to the entry that needs to be updated.
**STEP 1c** The Contact Diary Entry box will appear containing the previous comments. From here you can update the text in the action box.

**STEP 1d** Click *update* to complete the process of editing comments.

**STEP 1e** Finally click on the *Close* button.

**STEP 2a** To change a previous assessment decision go to the indicator to be updated and scroll down to the Contact Diary section.

**STEP 2b** Click the red cross to delete the entry.
**STEP 2c** Once the entry is deleted, scroll back up and and choose one of the available assessment decisions.

![Image of assessment decisions](image1)

**STEP 2d** If the assessment decision required isn’t available, the click the *submit on behalf of the learner* link.

![Image of submitting on behalf of learner](image2)

All four assessment decisions will appear.

**STEP 2e** As shown in the steps on page 11 then select the appropriate assessment and complete the Contact Diary entry.

![Image of Contact Diary entry](image3)

**STEP 2f** Click the **Private Box**, provide the reasons for the assessment decision in the **Actions Box**.

![Image of Private Box and Actions Box](image4)

**STEP 2g** Click **Create** to complete the task.

**STEP 2h** Finally click on the **Close** button.
**STEP 2i** Once assessment is complete and you’re ready to reveal the outcome to the practitioner, click the edit diary entry icon next to the relevant assessment decision.

**STEP 2j** Finally un-tick the private box in the Contact Diary Entry.
10. Contacting your practitioner via the e-portfolio system

Accompanying video can be found at: https://youtu.be/En8_PLiqZo?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMCiPj71

We recommend, for audit purposes, that any communication to do with the Public Health Practitioner Registration Support Scheme is communicated via the e-portfolio system. You can use the Message Centre to communicate with your practitioner within the e-portfolio.

**STEP 1a** To go to the Message Centre click on **Messages** in the top menu.

![Message Centre](image)

**STEP 1b** Click the **New Message** tab to create the message

![New Message](image)

You will now see a blank message box ready to compose your message.

![Compose Message](image)
**STEP 1c** Give your message a subject

**STEP 1d** Use the space provided to write the message. For example you can use the Message Centre to prompt your practitioner that feedback is ready to view as well as offering potential dates to discuss the feedback over the telephone.

**STEP 1e** You can then select a single or multiple recipients from the list of Practitioners.

**STEP 1f** Or you can use the Recipient Wizard to send a message to all your applicants at once or perhaps to send a message to the practitioners in a particular Cohort.
STEP 1g Once you have selected the recipient click the **Send** button to send the message to them.

The Applicant will see the notification that they have new messages when they next log in and they will probably receive an email alert too.

**Reading a Message**
The Message Centre will show your inbox. Here you will see any messages you have been sent. Any messages marked in bold, signify that they have not been read.

**STEP 2a** To reply to a message, click on the message in your inbox to open it and then click on the reply button.
**STEP 2b** As before compose your response in the space provided and click send when you are ready.
11. Assessing supporting information

Accompanying video can be found at: https://youtu.be/9aYDAlfA7X0?list=PLi_5bNEZWv_HAtCi1QAjo79BmiMCIPj71

Practitioners upload a copy of their CV and their Job Description as part of being assigned an assessor. These documents, usually, do not need to be formally assessed but are often useful for background information on the practitioner. On occasions, you may wish to partially accept the Job Description and CV.

However, once the portfolio is ready for verification this section will need to be signed off and must contain the following documents:

- A completed application form
- A current CV
- Their current job description
- A Testimonial
- A Reference
- Copies of original certificates certified as genuine by a senior colleague.

**STEP 1a** To sign off the supporting documents, follow the normal procedure choosing from the Accept; Partially Accept; Clarification or Resubmission as shown on page 11 of this guide.
12. Completing the assessor overview

Accompanying video can be found at: https://youtu.be/Po3_TmYDJI8?list=PLi_5bNEZWv_HAtCt1QAjo79BmiMCIPj71

Once the portfolio is ready for Verification, you will need to complete the Assessor Overview.

**STEP 1a** Click on the *Assessor Overview* link in the practitioner’s course folder.

**STEP 1b** A pop up box will appear and you will need to fill out the *Overview of Portfolio* box.

**STEP 1c** You should list all the standards that required clarification, resubmission or were partially accepted.

**STEP 1d** The currency of the evidence should also be confirmed.

**STEP 1e** A short paragraph providing a summary of the assessment is also required.
13. Using the forum

Accompanying video can be found at: https://youtu.be/9Mx3IIY7Jbs?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMCIPiJ1

Learning Assistant also offers a Forum which can be used to ask questions and share thoughts with other e-portfolio users such as the Practitioners, Assessors and Verifiers.

**STEP 1a** To access the forums, click on **Forums** in the yellow menu bar.

![Image of forums interface]

**STEP 1b** You will see a list of forum names from which you can click on the one you would like to read.

![Image of forums interface with a list of topics]

You will see a list of topics (or threads) in that forum...

...and the number of replies for each.
**STEP 1c** Click on a relevant topic to view the posts.

This will show all the posts on that topic.

**STEP 1d** If you wish to write a reply to any of the posts, click the reply button.

**STEP 1e** Add a message and click **Post**.
**STEP 2a** If you want to start a new topic you can return to the list of topics by clicking the **Back to Topics** button.

**STEP 2b** Then click **Create New Topic**

**STEP 2c** Add a Subject and Message as required.

**STEP 2d** Click **Post** once you’re ready to share in the forum.

The topic will then appear for others to reply to.

**Top tip!**
Check the forums regularly to keep abreast of the latest topics and to answer any of your practitioners queries.
14. What to do if your applicant self-elects a resubmission

Accompanying video can be found at:
https://youtu.be/Kt1zBV_NOII?list=PLi_5bNEZWv_HAtCi1QAjo79BmlMCIPj71

There may be times when an assessor has awarded a clarification, but the applicant feels they have better evidence in a different piece of work (i.e. in a new commentary).

If this is the case, the applicant will contact their assessor via the message centre and request the particular indicator as a resubmission.

STEP 1a To facilitate this request, navigate to the relevant indicator in the applicant’s course folder

STEP 1b You will need to: click the submit on behalf of learner link.
**STEP 1c** All the available assessment decisions will appear. You should choose resubmission.

**STEP 1d** In the Contact Diary comment box, under actions, you should state that the practitioner has self-elected a resubmission and will be addressing the relevant indicator in a new commentary.

In this instance, there is no need to tick the private box as this is an entry in response to a practitioner request.

**STEP 1e** Click Create and Close.
15. Breach of confidentiality

Confidentiality must be maintained at all times. A Practitioners e-portfolio must not provide any personal details of their clients and patients such as home addresses, NHS numbers and so on. If there is a breach of confidentiality in a commentary or piece of evidence, the Assessor usually follows the same procedure as for a clarification.

**STEP 1a** Go into course folder and click on any indicator in which the evidence containing the breach can be found.

**STEP 1b** Select **Clarification** as the Assessment Outcome.

**STEP 1c** The assessor should state in the comments that the evidence breaches confidentiality and that the evidence must be anonymised and re-presented prior to the indicator being submitted for assessment once more.

Accompanying video can be found at: [https://youtu.be/RdnV4KoQgi4?list=PLi_5bNEZWv_HAtCi1QAjO79BmlMCIPj71](https://youtu.be/RdnV4KoQgi4?list=PLi_5bNEZWv_HAtCi1QAjO79BmlMCIPj71)
In the event that the Indicator 3e titled “Act in ways that acknowledge the importance of data confidentiality and disclosure, and the use of data sharing protocols” has been assessed and accepted prior to the breach in confidentiality then you will need to change their assessment decision to a resubmission for 3e.

**STEP 2a** To do this the go to Indicator 3e in the applicant’s course folder.

**STEP 2b** Changes your assessment decision to a resubmission.

**STEP 2c** State in the Contact Diary comment box that there has been a breach of confidentiality and state the indicator where the breach had taken place.

Clearly, if 3e has not yet been accepted at this point, the assessor will need to be extra vigilant when assessing this indicator.