

ePortfolio How-To Guide for Supervisors

This guide aims to answer the most common questions about ePortfolio that we receive from supervisors.

www.nhseportfolios.org

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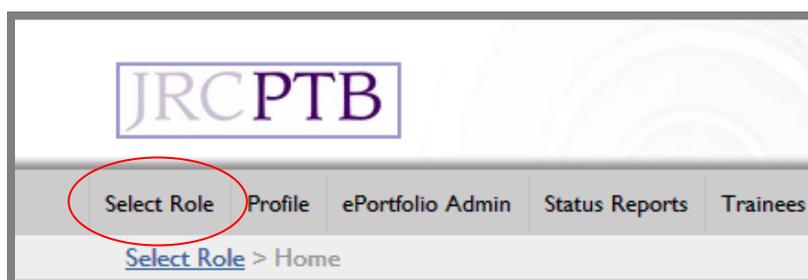
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Why Can't I See My Trainee's ePortfolio?

There are two possible reasons why they don't appear on your list of supervised trainees.

One is that they could be linked to a different 'role' you have on ePortfolio. To check this, try changing role you are signed in on (e.g. from Clinical Supervisor to Educational Supervisor) and looking at your list of supervised trainees again.



Another possibility is that they have not been linked with you. To remedy this situation you (or the trainee) will need to contact the relevant administrator at Health Education Wessex ('The Deanery') and let them know who the trainee is and whether you are their Clinical or Educational Supervisor.

Programme	Administrator
Cardiology Core Medical Training Dermatology Gastroenterology Haematology Neurology Occupational Medicine Renal	Rozz Morrissey rozz.morrissey@wessex.hee.nhs.uk
Clinical Genetics Clinical Neurophysiology Clinical Oncology Diabetes and Endocrinology Geriatrics GUM Immunology and Allergy Medical Oncology Paediatric Cardiology Palliative Rehabilitation Medicine Respiratory Rheumatology Stroke	Ysabel Woollan ysabel.woollan@wessex.hee.nhs.uk

Curriculum Sign Off

Trainees

The JRCPTB have produced video guides for trainees:

Linking assessments to curricula: www.youtube.com/watch?v=6A5aGaQXpsA&feature=youtu.be

How to add a trainee rating: www.youtube.com/watch?v=dMPJSHn8bfE&feature=youtu.be

Supervisors

The curriculum a trainee views depends upon the start date of their appointment. For more information please go to either www.jrcptb.org.uk/trainingandcert/ST3-SpR/Pages/Introduction.aspx (ST3+) or www.jrcptb.org.uk/trainingandcert/Pages/ST1-ST2.aspx (Core trainees). Trainees who have linked competences or evidence to the wrong curriculum will have to manually remove them and re-link them to the correct curriculum.

As a supervisor you can view the curriculum and see what evidence has been linked against each competency. You can add your own rating to show how you think the trainee is progressing and whether they are meeting the competency requirement. You will also be able to see to see trainee ratings, comments and supporting evidence as appropriate.

The screenshot shows the 'Trainee Dr - Home Page' interface. On the left is a navigation menu with options: Trainee Home, Profile, Curriculum (highlighted), Assessment, Reflection, Appraisal, and Progression. The main content area displays the trainee's name 'Trainee Dr' and title '- Home Page'. Below this, there are two curriculum items: 'Specialist Training WES740 (Physician Academic Checklist - All Clinical Trainees)' and 'Specialist Training WES740 (Physician Dermatology 2010)'. The second item is circled in red. To the right of the first item is a 'Message To Trainee' button. Below the curriculum items are sections for 'Alerts (0)', 'Courses & Seminars (0)', and 'Show users recent activity...'. A 'Tasks' section is also visible, with a table header containing 'Task Name', 'Status', and 'Due Date'. At the bottom, there is explanatory text about the navigation menu and descriptions for 'Profile' and 'Curriculum'.

Task Name	Status	Due Date
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Use the links in the left navigation to access information about this Trainee. The sections are divided into:

- Profile** - View information about the Trainee's personal and post details.
- Curriculum** - View and record the Trainee's progress through competencies in the curriculum

Competencies [Collapse All](#)

Clinical Competencies in Renal Medicine

Asymptomatic Proteinuria ⓘ

🔍 Reflection on Learning Event	21/11/2009	🔍
🔍 Teaching you have delivered	24/11/2011	🔍
👤 (T) Dr C	Fully competent 20/08/2012	""
👤 (ES) Dr G	Fully competent 07/09/2012	""

Click the i symbol for more information.

Click the magnifying glass for more information about the linked evidence (at least 2-3 good quality items should be linked).

Click on the competency to view more details and to rate a trainee for a curriculum item. Ratings will vary from specialty to specialty.

ePortfolio

Competency Details

Physician Renal Medicine 2007
Clinical Competencies in Renal Medicine
Asymptomatic Proteinuria

Add Rating/Comment

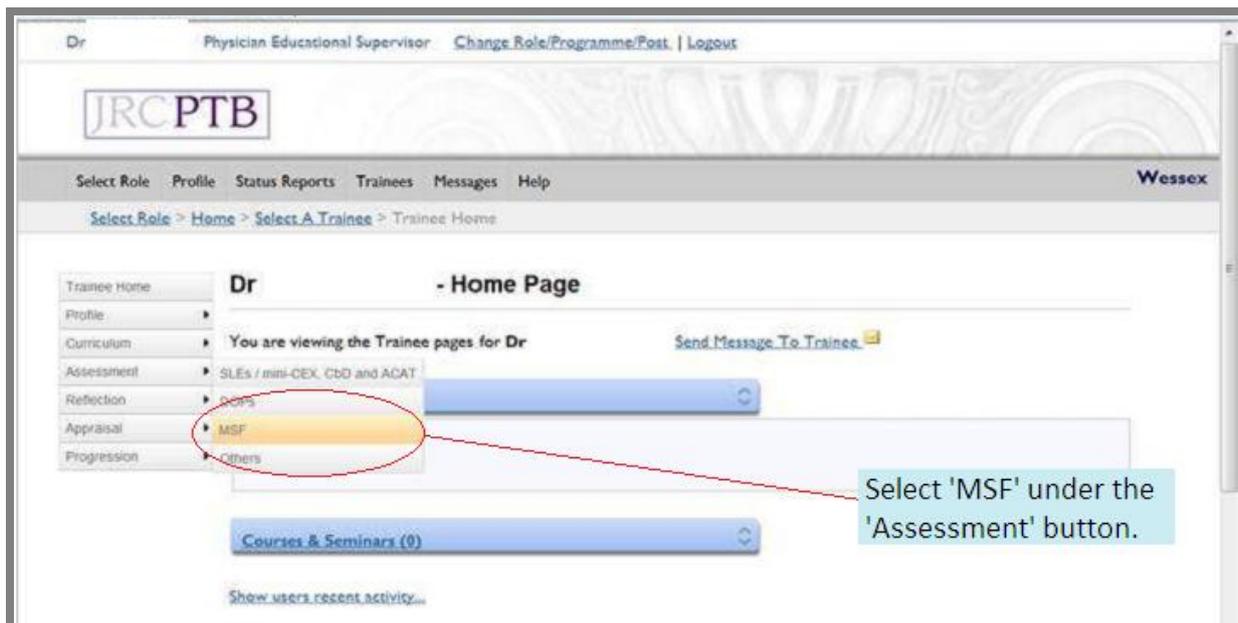
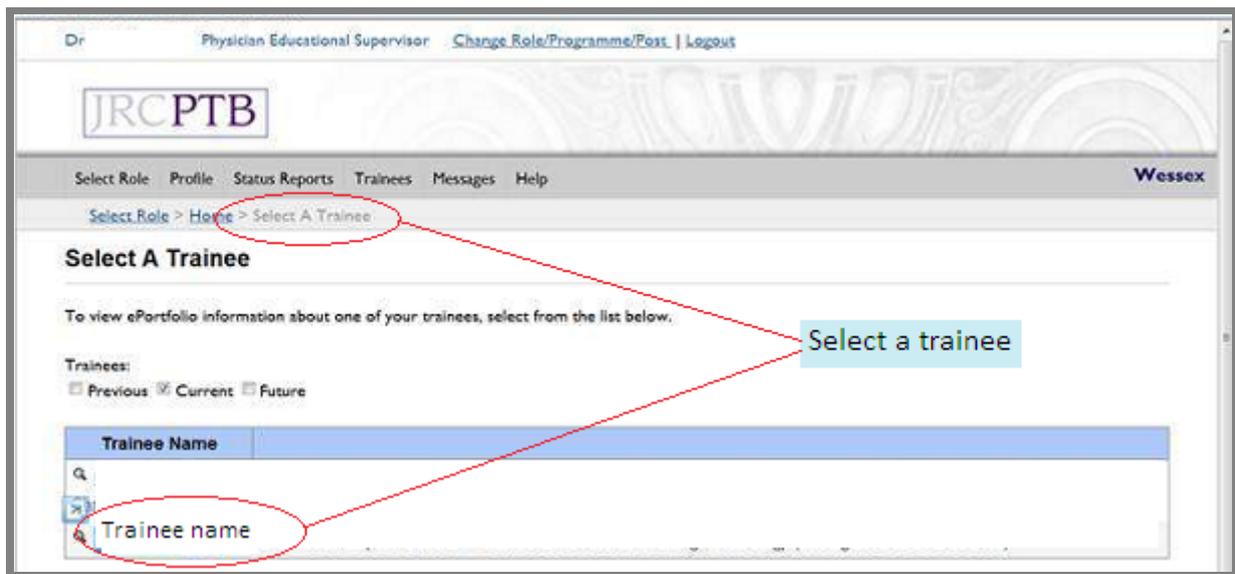
Rating: Blank

Comments:

Release an MSF Summary

First of all...

Are all the forms attached to the same post? If not, the trainee will need to ask an ePortfolio administrator (either at the Health Education Wessex or the hospital's education centre) to move the forms. There must be at least 12 responses.



There are three ways assessments can be recorded in the ePortfolio:

- Directly from a supervisor's access.
- Directly from the trainee's access.
- Using the "ticket" process to provide access to an assessor who may not have an ePortfolio account or be linked to the trainee.

Assessment Descriptions

Multi-source feedback (MSF) - [Read more...](#)

Click 'Add New Multi Source Feedback Form'.

Request External Assessment | **Add New Multi Source Feedback Form**

Select Role Profile Status Reports Trainees Messages Help **Wessex**

Select Role > Home > Select A Trainee > Trainee Home > Assessment > MSF > Select Type

Trainee Home
Profile
Curriculum
Assessment
Reflection
Appraisal
Progression

Dr - Dr - MSF Form

Please select where to file this Dr - MSF Form and then select the "Create" link.

File against

	Action
CT2 - Southampton General (01 Aug 2012 to 04 Dec 2012)	X
CT2 - Southampton General (01 Aug 2012 to 04 Dec 2012)	X
CT1 - Southampton General (04 Apr 2012 to 31 Jul 2012)	Create
CT1 - Southampton General (07 Dec 2011 to 03 Apr 2012)	X
CT1 - Southampton General (03 Aug 2011 to 06 Dec 2011)	X
summary MSF	X
MSF	Create
MSF Self	X

Select the post to save the summary under (this should be the same post as the individual forms are saved under).

Select Role Profile Status Reports Trainees Messages Help **Wessex**

Select Role > Home > Select A Trainee > Trainee Home > Assessment > MSF > Select Type

Trainee Home
Profile
Curriculum
Assessment
Reflection
Appraisal
Progression

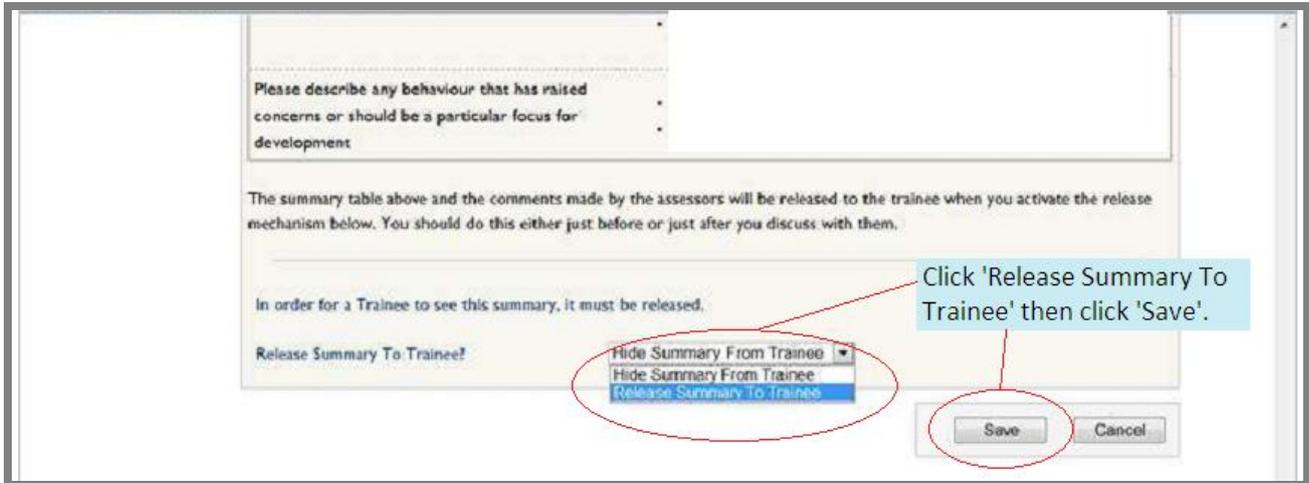
Dr - Dr - MSF Form

Please select where to file this Dr - MSF Form and then select the "Create" link.

File against

	Action
CT1 - Southampton General (04 Apr 2012 to 31 Jul 2012)	X
Summary MSF	Create
MSF	Create
MSF Self	X

Click the 'Create' link next to 'Summary MSF'.



Confirm a Certificate or Exam

The trainee can record any certificates and exams here. When you have seen the original certificate you can verify the entry on their Certificates and Exams log.

Trainee Home **Trainee Dr** - Certificates and Exams

Profile ▶ Personal Details

Curriculum ▶ Post / Supervisor Details

Assessment ▶ Declarations and Agreements

Reflection ▶ **Certificates and Exams**

Appraisal ▶ Personal Library

Progression ▶ Absences

Add New Certificate or Exam

Certificates and exams listed for this account on ePortfolio. To add a new certificate or exam to the list, select the "Add New Certificate or Exam"

If a certificate is valid, a Supervisor must view the paper certificate and Confirm it. If there is an electronic version of the certificate available, it can be uploaded via the "Upload" link.

Certificate/Exam	Expiration Date	Expected Exam Date	Exam Passed Date	Confirmed?	Confirmed By	Confirmed Date	Action
ALS (Advanced Life Support)	-	-	-	X	-	-	Upload Confirm Edit Delete

Appraisal

Trainees can record their own induction and mid-point appraisals. However, they cannot record end of attachment appraisals (this can only be created through the supervisor's login). One way of working could be to ask your trainees to save a draft of induction and mid-point appraisals. Then you can check them and save a final version.

Please note that trainees must have a full Supervisor's Report (see next section of guide) for their ARCPs.

Trainee Dr - Appraisal

A formal process of appraisals and reviews underpins Medical Training. This process ensures adequate supervision for you during training, and provides continuity between posts and different supervisors.

Appraisal can be written in draft by the trainee and then checked and finally saved by the supervisor. End of attachment appraisals can only be written by supervisors.

Induction Appraisal - [Read more...](#)
Mid-point Review - [Read more...](#)
End of Attachment Appraisal - [Read more...](#)
Educational meeting - [Read more...](#)

Supervisors: To add a Comment or a Signature to a specific record, click on the 'Link' icon.

[Add Appraisal](#)

Appraisal Form	View Submissions
ST4 -	
Induction Appraisal Form	🔍 03 September 2010 14:41

Click 'Appraisal' under the 'Appraisal' button on the menu.
 Click 'Add Appraisal'.
 Click the links to view previous appraisals.

Please select where to file this Appraisal Form and then select the "Create" link.

File against

Make sure you choose the right post.

Appraisal Form

OOP -
 OOP -
 ST4 -
 ST4 -
 ST3 -
 FTST/
 FTST/

Action
X
X
Create
X

End of Attachment Appraisal
 Educational Meeting

Click 'Create'

Any other comments

Agreed the Record of Competence?

Save Form As Draft?

Save Cancel

Complete the various fields.

Remember to save drafts regularly (tick the 'Save Form As Draft' box then click 'Save').

When you wish to finalise the form, untick the Draft box and click 'Save'.

You can save a draft and continue working on the form at a later date.

Supervisor's Report

Trainees require a full Educational Supervisor's Report for their ARCPs. This report can cover more than one post, e.g. three jobs in a CMT CT2 year. Trainees can see the reports but cannot add or update them. The reports can only be created through the designated supervisor's ePortfolio login

To record a Supervisor's Report...

Trainee Home

Profile

Curriculum

Assessment

Reflection

Appraisal

Progression

Trainee Dr - Supervisor's Report

This report is key to informing the Training Programme Director (or deputy) about the trainee's progress. The form should be completed by the trainee's Educational Supervisor, after a thorough ePortfolio review. Where the Educational Supervisor is not the current clinical supervisor, it is mandatory that clinical supervisors' reports (including the mid and/or end of attachment appraisals) and relevant information from other health professionals about the trainee's performance is reviewed prior to completion of this report. The report needs to be honest, constructive, accurate and defensible.

Summary Overview

Supervisor's Report [Actions - Read more...](#)

ARCP

Add Supervisor's Report

Supervisor's Report	View Submissions
ST4 -	
Supervisor's Report	25 June 2010
ST3 -	
Supervisor's Report	03 June 2009 21:11

To view data security and data protection information see Help section, About ePortfolio

Click 'Supervisor's Report' under the 'Progression' button.

Click 'Add Supervisor's Report' button.

Follow same steps as for adding an appraisal form (previous section of guide).