## 1. Initial Meeting with trainee
- Create a PDP and learning agreement
- When a trainee arrives at your hospital they will need to create a PDP and learning agreement. This will provide a list of objectives for their training year.
- Each trainee could have a single PDP for each year on which objectives can be signed off as complete and new objectives added as the year progresses. The whole PDP can then be signed off as complete towards the end of the year. It is, therefore, important to try and keep the objectives achievable.
- Before having an initial meeting with their ES or CT trainees should create a PDP on their e-portfolio and set this as a learning agreement. They should use for example “PDP for ST3” as the description and should then list a few objectives. When you meet up with them you can then review and approve these objectives. If the trainee preloads their PDP it may encourage them to think about things prior to the meeting and should allow more discussion time during meetings.

## 2. Subsequent meetings with trainees
- It is possible for both ES and CT to access and update the trainees’ PDP. I would suggest that at each meeting any objectives that have been achieved can be marked as complete and relevant new ones added.

## PDP construction
- It is important to keep the objectives specific and achievable depending on the trainee’s grade and requirements. For example an initial PDP for an ST4 may look like this:
  - “Description: PDP for ST4 year
  - Objective 1: Complete remaining Units of Training required for intermediate level training
  - Objective 2: Complete an audit
  - Objective 3: Attend management course
  - Objective 4: Pass FRCA”

## PDP updates
- By keeping the objectives simple and separate it makes signing off complete ones easy and allows the trainees e-portfolio to gradually grow and illustrate their progress throughout their training year.
**3. Assessments**

- I feel we should put the emphasis on getting all “Units of Training” sign offs completed on the e-portfolio. This means that if trainees are having problems getting WPBAs completed on the e-portfolio they can concentrate on getting UoT sign offs. They will need to go to the relevant person with their paper WPBAs, Logbook and other required evidence and the assessor can then sign off the UoT on the e-portfolio.

- If the trainee has completed their WPBAs using the e-portfolio then any WPBAs they have linked to a specific UoT will automatically appear on the UoT sign off form when you attempt to complete it, as will logbook activity or MSF the trainee has linked to that part of the curriculum.

- Assessors are now able to mark “excellent” or “unsatisfactory” to a number of domains at the bottom of the WPBAs completed on the e-portfolio. This is not essential and should only be completed if the trainee performance was deemed excellent or unsatisfactory.

- WPBA’s completed on paper and subsequently uploaded to the e-portfolio will also appear on the UoT sign off forms if the trainee has linked them appropriately. Any other relevant activity eg course/presentation/audit that the trainee has attended/completed can also be linked to appropriate units of training if the trainee uploads the certificate/presentation/report into their Library and then links it to the relevant part of the curriculum. Hopefully when signing off a Unit of training the assessor will then be able to see all and any evidence that supports the attainment of the core learning outcomes.

- MSF is an essential part of the assessment process. It can be done using the e-portfolio and the trainee can choose assessors who are not registered with the e-portfolio. They will just have to enter their e-mail address. The ES role will be to approve the chosen list of assessors prior to the forms/requests being sent out. An MSF is an annual requirement. The process, at least initially, may take a bit of time so I would suggest MSF are requested in a timely fashion.

- E-Portfolio will keep the MSF open for 1 month from the day that the assessors are approved by the ES. After that time the ES will get access and will be able to feedback to the trainee before the trainee will get personal access to the results.

**4. ARCP reports**

- Known as ESSR on e-portfolio (Educational supervisors structured report)

- It is very close to our current ARCP-ES and if a trainee uses the e-portfolio well during the year it will mean that their preparation for their ARCP will take less than 5 minutes. However, if the trainee has not used the e-portfolio at all they can still enter all the relevant data manually. They will have to upload a CV and Logbook summary as well.
<table>
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<tr>
<th>RCOA e-Portfolio in Wessex</th>
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<tr>
<td>- After the trainee has created an ESSR the educational supervisor will be sent the form to approve and add any comments of their own. The form will then be sent on to the college tutor to do likewise. The form will then be locked down and made available to ARCP panel members to view prior to the ARCP.</td>
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<td>- Once the trainee has submitted the ESSR to their ES they will not be able to associate any subsequent WPBAs/Activities to that ARCP.</td>
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<tr>
<td>- <strong>From August 2013 all ARCP’s in Wessex will be carried using the e-portfolio.</strong></td>
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<td>- The only way of submitting the required paperwork for an ARCP will be via the e-portfolio. As is the current case, e-portfolio evidence will need to be available at least one week prior to the ARCP date so that panel members will be able to review the evidence prior to the ARCP itself.</td>
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5. BLT and ILT certificates
- Trainees should continue to receive Paper Certificates. They will then be able to scan these into their e-Portfolio and upload them into the relevant Certificate area of the e-Portfolio Library.

6. WPBAs
- It is still proving difficult for some trainees to get their WPBAs completed on the e-portfolio but many are now scanning paper versions and uploading them onto the system. This is fine as they can still associate this evidence to the appropriate Unit of training/ARCP year. |
- I think at this stage we should concentrate on getting ALL units of training signed off directly on the e-Portfolio. This should require fewer assessors to be fully au fait with the system and still allow the important parts of the ESSR form to automatically complete.

7. Units of Training
- These can be initiated by the trainee or trainer. Any information or evidence or WPBA that the trainee has associated to the UoT will automatically appear on the form when you start to complete it. |
- Trainees who are not using the e-portfolio should bring their paper WPBAs, logbook and number of sessions in that UoT to show the person who is completing the UoT sign off on the e-portfolio so that they can verify them.

8. Trainees as Assessors
- All higher level trainees in Wessex (ST5 and above) will now be able to act as assessors on the e-portfolio. They can only act as assessors for more junior trainees. Trainees must ensure that greater than 2/3 of their assessments are completed by consultants.

This document is meant as a guide or suggestion for how we use the e-Portfolio in an effort to obtain a degree of consistency across the region.