



Royal College of
General Practitioners

THE *e*PORTFOLIO FOR GP SPECIALTY TRAINING

A GUIDE FOR TRAINERS/CLINICAL SUPERVISORS

PLUS ADDITIONAL FUNCTIONALITY FOR EDUCATIONAL SUPERVISORS

UPDATED FOR NOVEMBER 2014

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INTRODUCTION

This Manual is designed to explain the use of the ePortfolio for Trainers/Clinical Supervisors* and Educational Supervisors.

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:



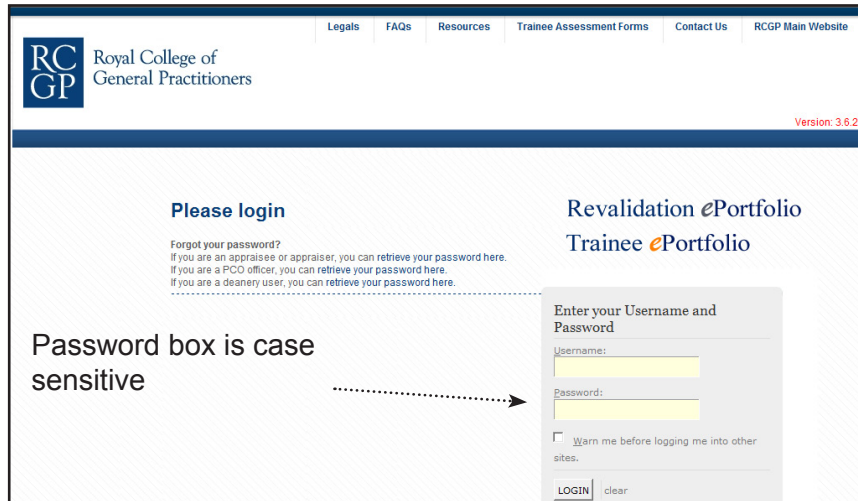
The second section focuses on functions that are specific to the Educational Supervisor role, as well as tasks they will need to undertake. Educational Supervisors should therefore pay particular attention to this section.

* Throughout this manual, the term Trainer is used to denote both Trainers (in GP setting) and Clinical Supervisors (in hospital setting)

SECTION I: THE ePORTFOLIO

LOGIN AND HOME PAGE

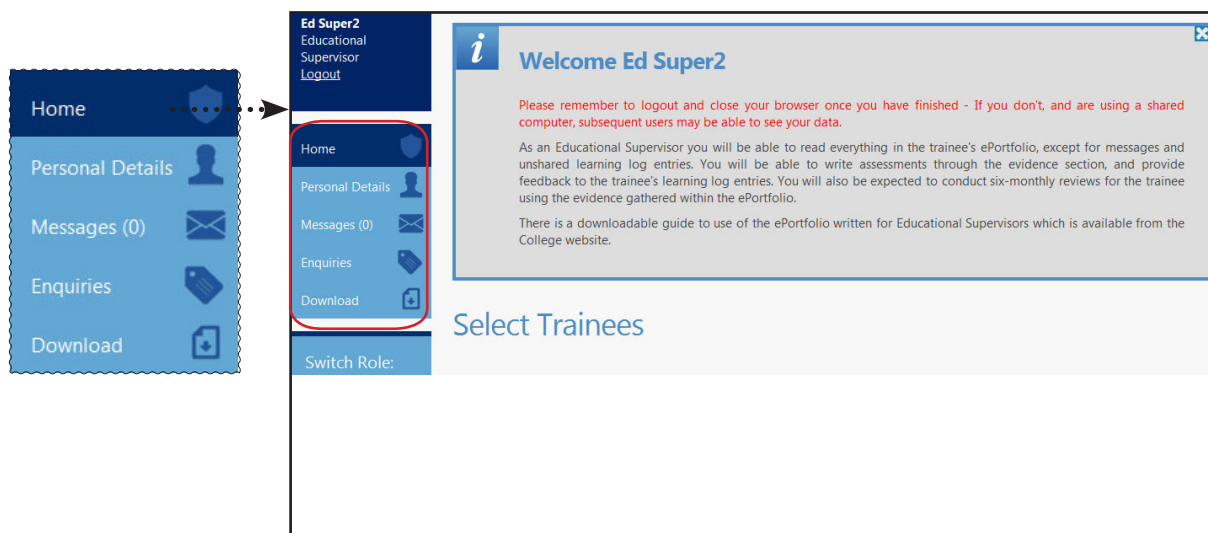
This manual gives an introduction to Educational Supervisors/Trainers on how to use the functions within ePortfolio. You will have been provided with a username and password and these should be entered into the login screen shown below: <https://gpeportfolio.rcgp.org.uk>



If you have forgotten your password, please use the third Forgotten Password option labelled 'If you are a deanery user' which allows you to enter an email address to retrieve a password. Please note, 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

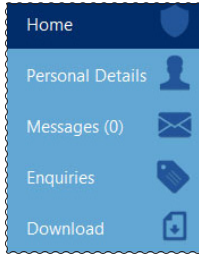
Once you have logged into ePortfolio, you will be on the home page which is entitled '**Welcome Dr ...**'.



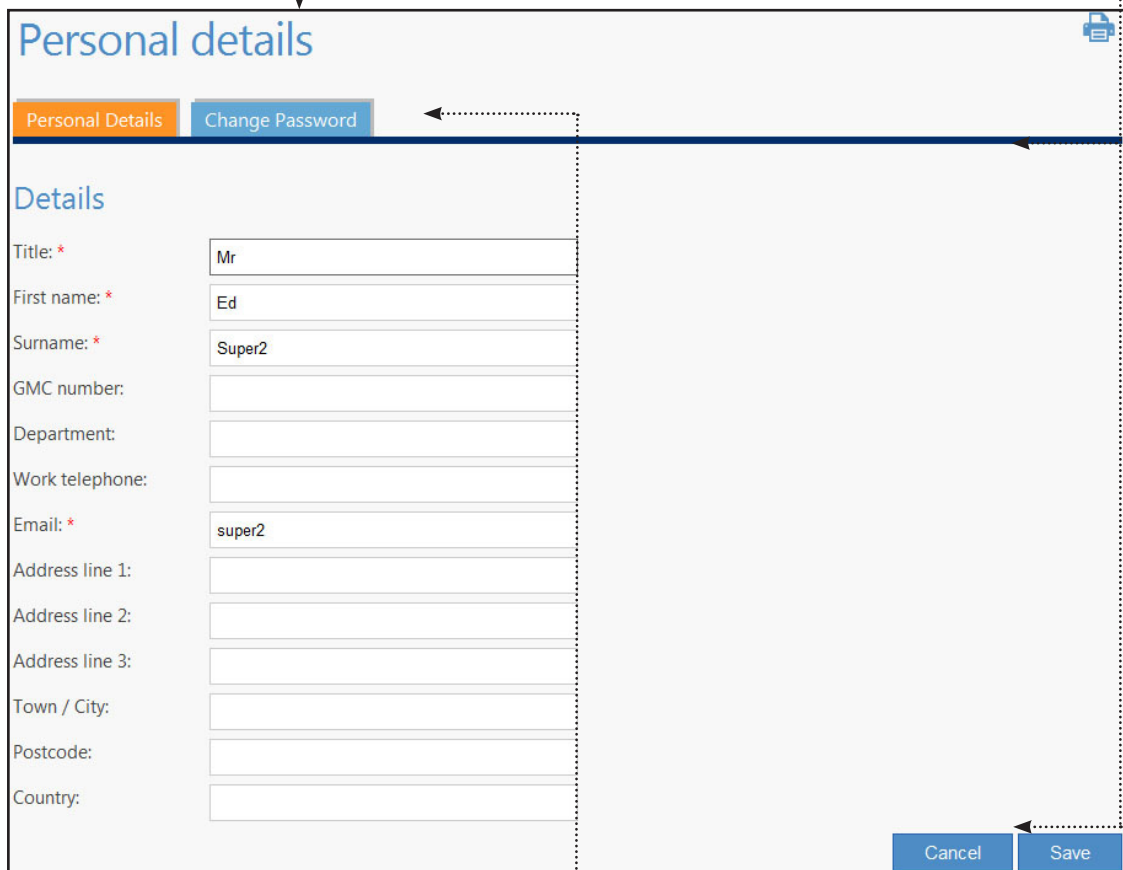
In the next few pages we will look into personal learning details and messaging through ePortfolio.

PERSONAL DETAILS

The Personal Details section contains information such as address, email, phone number and login details. To access this information select 'Personal Details' on the left toolbar (Section shown below).



As an Educational Supervisor/Trainer, you will be able to update information shown in the Personal Details page.

The 'Personal details' page has a light blue header with the title and a print icon. Below the header are two tabs: 'Personal Details' (active) and 'Change Password'. The main content area is titled 'Details' and contains a form with the following fields: Title: * (Mr), First name: * (Ed), Surname: * (Super2), GMC number: (empty), Department: (empty), Work telephone: (empty), Email: * (super2), Address line 1: (empty), Address line 2: (empty), Address line 3: (empty), Town / City: (empty), Postcode: (empty), and Country: (empty). At the bottom right are 'Cancel' and 'Save' buttons. A dotted arrow points from the 'Change Password' tab to the text below.

Changes to your password are made here.

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.

Next tutorial

[Return to messages](#) Delete Reply

From: Gp TraineeA
To: Gp TraineeA
Date sent: 23/10/2014 13:14

Hello,

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.

The screenshot shows a search interface for selecting recipients. It includes a search bar, filters for roles and ST Year, and a search button. The current state shows no results.

Type in all or some of the name for 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.

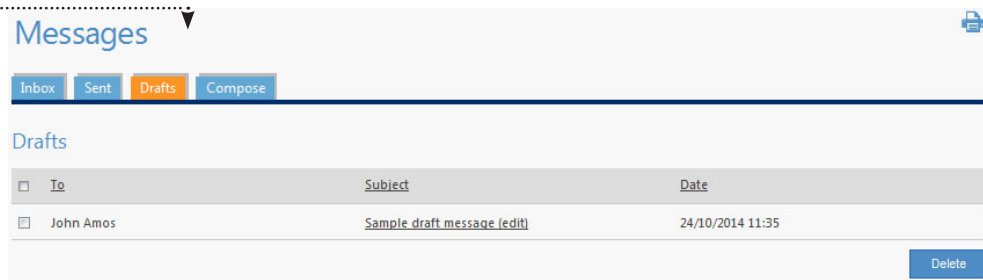
To remove a recipient: click on the relevant field to get the contacts box, search for the recipient to be removed, untick the box next to their name, click 'select'.

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'.

DRAFTS

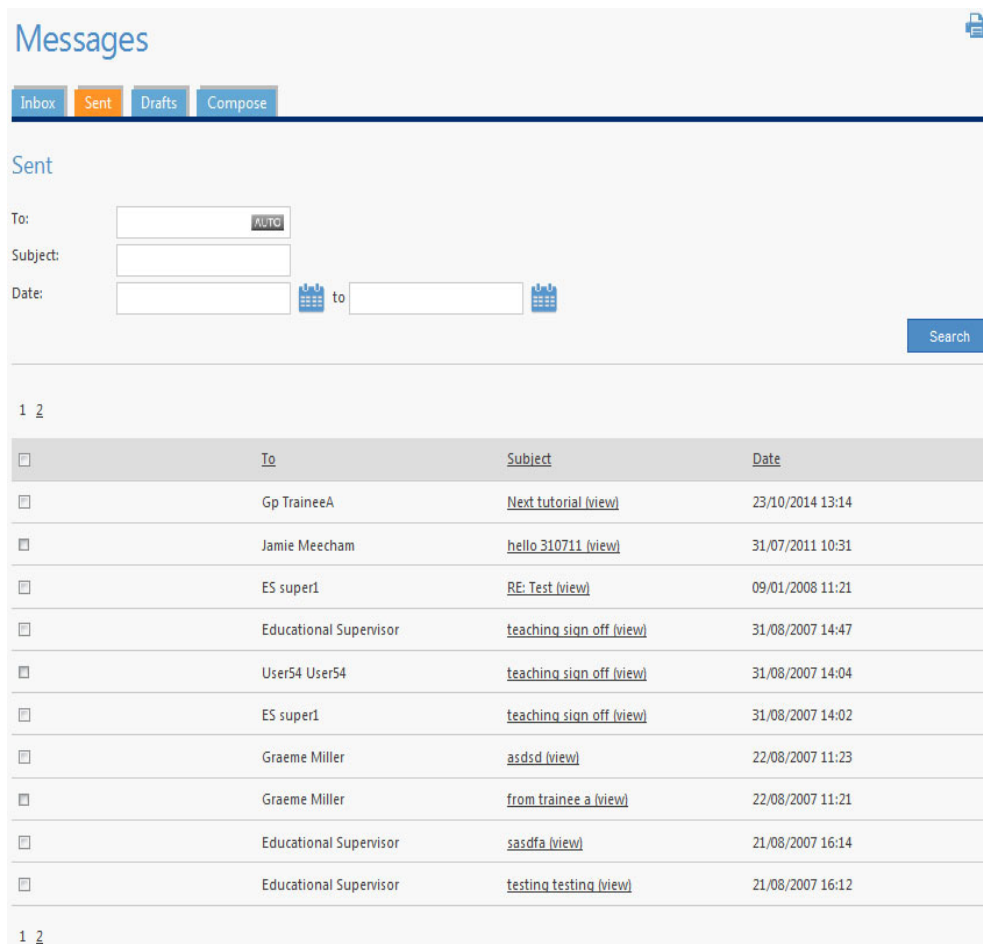
Saved messages are shown here for the user to edit/send them later.



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.

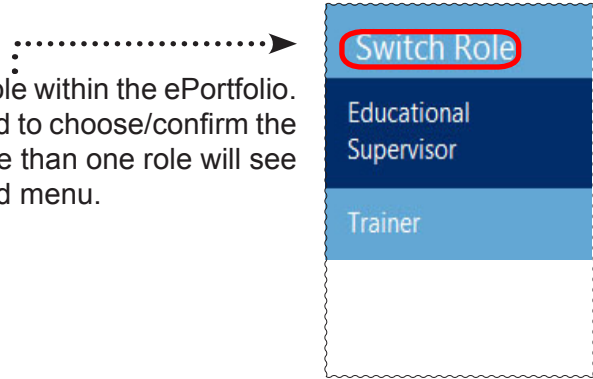


TRAINEE RELATED ACTIVITIES

The trainee activities relate to functions the Educational Supervisor/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 choose/confirm the role that you are logging in for. If you have more than one role will see the following 'Switch Role' option in the left hand menu.



To switch from your role of Trainer 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. Click on 'Summary' for an overview of the contents of the trainee's eportfolio. Click on 'home' above 'personal details' at any time to return to the welcome page.

The sidebar on the left contains the following items: Home, Personal Details, Messages (0), Enquiries, and Download. The 'Select Trainees' table is as follows:

Trainee	Post	Downloads
User1_testing	ST2/(Geeks) London Specialty School of General Practice/Accident & Emergency/Full Time	Downloads
Declarations No	ST1/(Geeks) London Specialty School of General Practice/Accident & Emergency/Full Time	Downloads

This side bar will always show your currently selected trainee.

The dashboard for Jenny Williams shows the following details:

- Title:** Dr
- First name:** Jenny
- Surname:** Williams
- GMC number:** 20030
- Training number:** ---
- Email:** jenny.williams@nat.co
- Expected end of Training date:** 28/02/2015 (ST1)

Posts:

Post	From	To
ST1(Geek) St George's Hospital - A&E/Accident & Emergency/Full Time	01/08/2012	28/08/2014
ST1(Geek) London Specialty School of General Practice/Accident & Emergency/Full Time	28/08/2014	28/02/2015

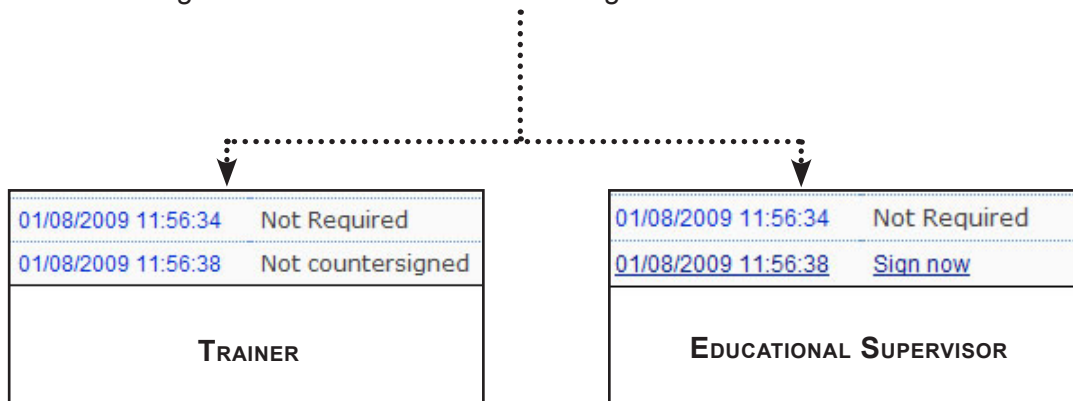
Next Review:

Requirement	Completed
miniCEV or COP	0
CDI	0
MSF	0
PSQ	0
CDPS	0
CR	0

Declarations:

Declaration	Signed By	Signed	Countersigned
Probity: Professional Obligations	Trainee	08/08/2013 17:26	Not required
Health: Professional Obligations	Trainee	08/08/2013 17:26	Not required
Educational Agreement	Trainee	08/08/2013 17:26	27/08/2013 17:26

NB Trainers can only view a trainee's declarations. 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.

Declarations			
Declaration	Signed By	Signed	Countersigned
Probity: Professional Obligations	Trainee	08/08/2013 10:01	Not required
Health: Professional Obligations	Trainee	08/08/2013 10:04	Not required
Educational Agreement	Trainee	08/08/2013 10:04	27/08/2013 17:26

[Historical Declarations](#)

Clicking on Historical Declarations will allow you to see them.

Declarations signed prior to August 2010

ST1//Market Street Health Group/General Practice/Full Time --- 04/02/2009 - 04/08/2009

Type	Signed By	Signed	Countersigned
Educational Agreement	Trainee	13/02/2009 12:46	24/06/2009 21:11
Health: Regulatory and voluntary proceedings	Trainee	13/02/2009 12:46	Not required
Health: Professional Obligations	Trainee	13/02/2009 12:46	Not required

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 connected to the log entry.

The number of unread logs you have for a particular trainee will also be shown on the trainee's dashboard.

Type	Subject Title	Event	Date	Shared	Read	Has Comment	Att.	Unread	Comment
Clinical Encounter	Title	Patient attended surgery with sister and niece. Admitted to 2 attempted suicides the previous day by hanging. Not...	07/08/2012	✓	✓	✓			

Users can specify how many Logs are displayed per page (10/15/20/25) using the drop down option.

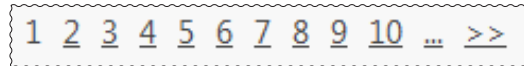
NAVIGATE THE LEARNING LOG

The Learning Log has several tools to help you navigate it. By default it shows only the most recent entries. However you can change what is viewed here.

1. By selecting on a Learning Log Type from the drop down and clicking 'search', you can filter to display only those entries.

Type: **All**
Keywords:
Search
Export All
Page size: 10 items
1 2 3 4 5 6 7

2. If you have selected this, clicking on 'All' will take you back to viewing all the Logs.
3. You can also switch between each page by the numbered links at the top and bottom of the table.



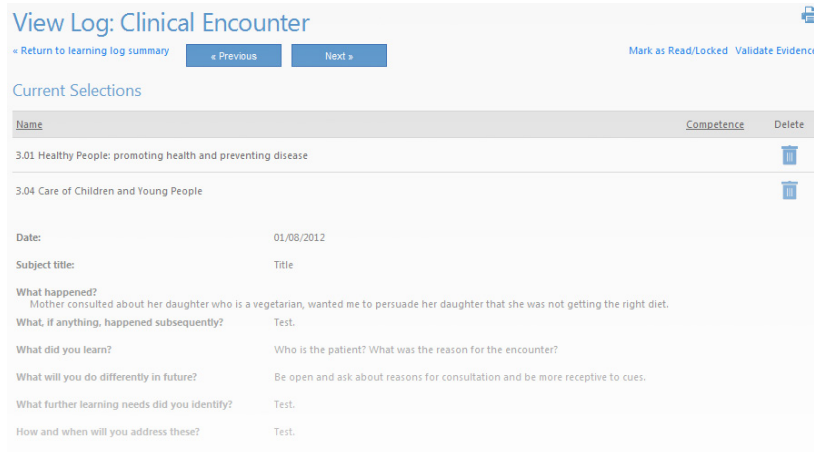
4. Finally you can click on any of the headings to sort by that column type.

Type	Subject Title	Event	Date	↓	Shared	Read	Has	Att.	Unread
------	---------------	-------	------	---	--------	------	-----	------	--------

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 title next to the entry.
4. The log will open up to display the contents of the log.



View Log: Clinical Encounter

< Return to learning log summary < Previous Next > Mark as Read/Locked Validate Evidence

Current Selections

Name	Competence	Delete
3.01 Healthy People: promoting health and preventing disease		
3.04 Care of Children and Young People		

Date: 01/08/2012

Subject title: Title

What happened?
Mother consulted about her daughter who is a vegetarian, wanted me to persuade her daughter that she was not getting the right diet.

What, if anything, happened subsequently? Test.

What did you learn?
Who is the patient? What was the reason for the encounter?

What will you do differently in future?
Be open and ask about reasons for consultation and be more receptive to cues.

What further learning needs did you identify? Test.

How and when will you address these? Test.

5. You can then mark the entry as read by clicking on 'Mark as Read/Lock' at the top of the screen.
6. The entry will then be marked as read **and prevent further editing by the Trainee.**

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. 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.

3. Click on 'New Comment' at the bottom of the screen.

4. Enter the comment and then 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/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'.

Pick Professional Competence Areas

« Return to learning log entry

Pick Professional Competence Areas | Select Descriptors

Competences:

- Communication and consultation skills
- Practising holistically
- Data gathering and interpretation
- Making a diagnosis/decisions
- Clinical management
- Managing medical complexity
- Primary care admin and IMT
- Working with colleagues and in teams
- Community orientation
- Maintaining performance, learning and teaching
- Maintaining an ethical approach
- Fitness to practise

Cancel Save

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.

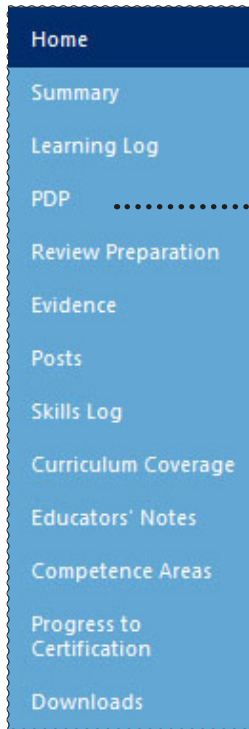
The curriculum statement headings were updated August 2012

- 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).
- The curriculum statement headings summary table (counting log entries) will appear twice where a Trainee has validated logs against both versions.

PERSONAL DEVELOPMENT PLAN

Functions Available

- View a Trainee's PDP Entries



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.

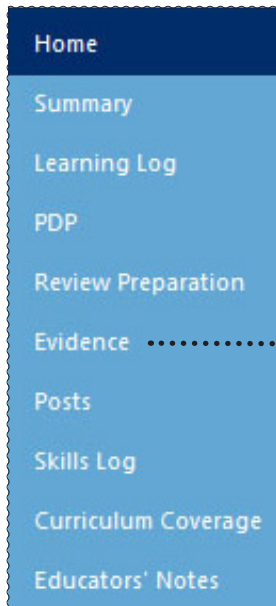
As a trainer, the personal development plan section is only available to you for viewing.

Date Created	Learning Objectives	Target Date	Action Plan	Achieved	Att.
24/10/2014	Here is the title (from log entry)	01/10/2014	Here is the title		
18/02/2013	ww (From Log entry)	18/02/2013	ww (From Log entry) - (Time Scale:)		
02/12/2012	Telephone consulting and triage To...	02/12/2012	-Intially sit on morning telephone...		
27/09/2012	test5 (From Log entry)	27/09/2012	test6 (From Log entry) - (Time Scale:)		
07/08/2012	I need to learn more about what...	07/08/2012	Read local guidelines on referral to...	✓	

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
- miniCEX
- DOPS
- CbD
- COT
- PSQ
- CSR (Clinical Supervisor Only)

Details of the posts (past, present and future) for each trainee can also be seen under 'Posts'.

Assessments relating to each post can be viewed separately clicking the 'view' link.

Requirement	Completed	Minimum
mini-CEX or COT	14	6
CbD	6	6
DOPS (as appropriate)	4	As appropriate
PSQ (if not yet completed in ST3)	1	1
MSF (5 clinicians and 5 non-clinicians if in Primary Care)	12	10 (10 if in primary care)

Please note: These are minimum requirements (based upon Full Time Training) and additional evidence may be requested by your educational supervisor or following a deans panel review.

Posts



Posts	Dates	Educational Supervisor	Clinical Supervisors/Trainers/Academic Supervisors	Assessments
ST1//Z RCGP Test Location 1/Care of Elderly/Part Time 60%	01/01/2010-19/03/2012	ES super1	James Brown	View
ST1//Z RCGP Test Location 1/Community Child Health/Part Time 60%	02/07/2010-19/03/2012	ES super1	James Brown	View

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.

Evidence

Review Type: Review number:

Summary MSF PSQ miniCEX DOPS CbD COT CSR

Forms submitted between 04/02/2011 and 03/08/2011

Requirement	Completed	Minimum
mini-CEX or COT	14	6
CbD	6	6
DOPS (as appropriate)	4	As appropriate
PSQ (if not yet completed in ST3)	1	1
MSF (5 clinicians and 5 non-clinicians if in Primary Care)	12	10 (10 if in primary care)

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 2 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 a 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 into 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 DOPS information for this trainee.

Evidence

Review Type: Review number:

Summary MSF PSQ miniCEX DOPS CbD COT CSR

Direct Observation of Procedural Skills

Forms submitted between 03/06/2009 and 02/02/2010

RCGP Direct Observation of Procedural Skills

Submissions (4) [View Submissions](#)

Fill one in [Fill](#)

View a blank form [Preview](#)

For this review DOPS (as appropriate)

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, DOPS, CbD, COT and CSR. We will continue using DOPs as an example.

Evidence

Review Type: Review number:

Summary MSF PSQ miniCEX **DOPS** CbD COT CSR

Direct Observation of Procedural Skills

Forms submitted between 03/06/2009 and 02/02/2010

RCGP Direct Observation of Procedural Skills

Submissions (4) [View Submissions](#)

Fill one in [Fill](#)

View a blank form [Preview](#)

For this review DOPS (as appropriate)

1. Click on DOPS as circled above
2. Click on the 'Fill'
3. A blank form will open up allowing you to complete the assessment information.
4. Click 'Submit' once completed.

Summary MSF PSQ miniCEX **DOPS** CbD COT CSR

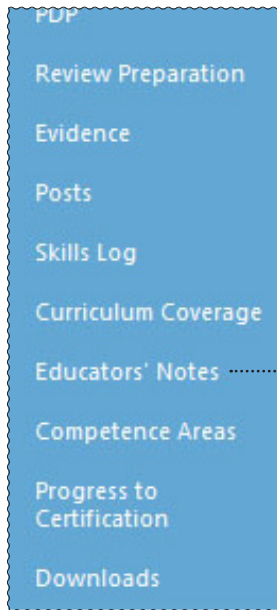
DOPS

Doctor's Surname: TraineeA
 Doctor's Forename: Gp
 Doctor's GMC Number: 123Train
 Clinical setting: *
 Procedure: *
 If Other, please specify:
 Assessor's position: *
 Number of previous DOPS observed by assessor with ANY trainee: *
 Number of times procedure performed by this trainee: *
 Difficulty of procedure: *

Please grade the following areas using the scale below:
 Please mark as 'Insufficient Evidence' if you have not observed the behaviour and feel unable to comment.

Area	Grade				
Demonstrates understanding of indications, relevant anatomy, technique of procedure	<input type="radio"/> Insufficient evidence	<input type="radio"/> Below expectation for completion	<input type="radio"/> Borderline for completion	<input type="radio"/> Meets expectation	<input type="radio"/> Above expectation
Obtains informed consent	<input type="radio"/> Insufficient evidence	<input type="radio"/> Below expectation for completion	<input type="radio"/> Borderline for completion	<input type="radio"/> Meets expectation	<input type="radio"/> Above expectation
Demonstrates appropriate preparation pre-procedure	<input type="radio"/> Insufficient evidence	<input type="radio"/> Below expectation for completion	<input type="radio"/> Borderline for completion	<input type="radio"/> Meets expectation	<input type="radio"/> Above expectation
Appropriate analgesia or safe sedation	<input type="radio"/> Insufficient evidence	<input type="radio"/> Below expectation for completion	<input type="radio"/> Borderline for completion	<input type="radio"/> Meets expectation	<input type="radio"/> Above expectation

EDUCATORS' NOTES



This section allows for 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 will be date stamped, with the name of the person who entered it and a subject field. Trainees will be able to view everything that is entered in this section, but will only be able to respond to it through their learning log. It will also be 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.

New Educators' Note

Date: 05/11/2014

Title: *

Note: *

REVIEWS

Functions Available

- Create and Amend Review Date
- Curriculum Coverage
- Skills Log
- Trainee Self Rating
- Professional Competences

Home
Summary
Learning Log
PDP
Review Preparation
Evidence
Posts
Skills Log
Curriculum Coverage
Educators' Notes

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.



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.

End Of Review Period	Review Type	Outcome	Self Rating Complete	Is Accepted By Trainee	Edit	View
01/10/2014	ST1-1	Satisfactory progress	✓	✓		View Download
01/04/2015	ST1-2					

[Add New Review »](#)

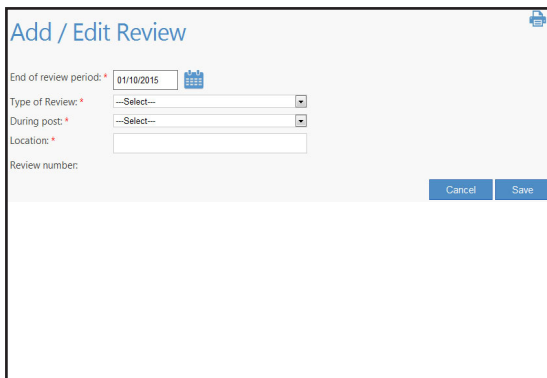
RECORD NEW REVIEW

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'. **NB You can't create or edit a review until the Educational Agreement has been countersigned.**
2. The Setup page will appear as below.



The screenshot shows a web form titled "Add / Edit Review". It contains the following fields and controls:

- End of review period:** A date input field showing "01/10/2015" with a calendar icon to its right.
- Type of Review:** A dropdown menu with "--Select--" as the current selection.
- During post:** A dropdown menu with "--Select--" as the current selection.
- Location:** A text input field.
- Review number:** A text input field.
- Buttons:** "Cancel" and "Save" buttons are located at the bottom right of the form.

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 6 months from the last review date.

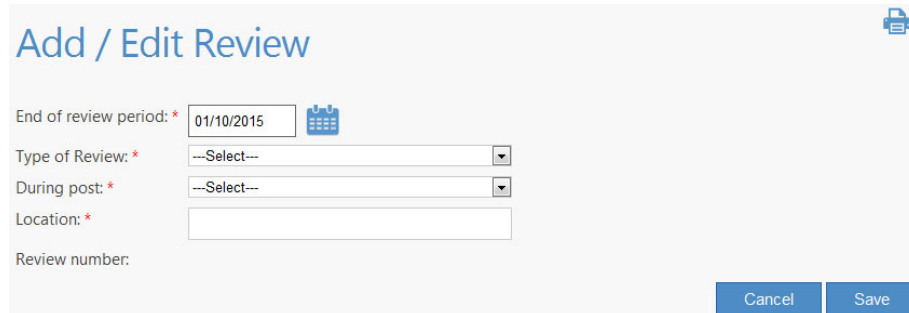
You will just need to ensure you select the correct ST year for the review.

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 screenshot shows a web form titled "Add / Edit Review". It contains the following fields and controls:

- End of review period:** A date input field containing "01/10/2015" with a calendar icon to its right.
- Type of Review:** A dropdown menu with the text "---Select---".
- During post:** A dropdown menu with the text "---Select---".
- Location:** An empty text input field.
- Review number:** An empty text input field.
- Buttons:** "Cancel" and "Save" buttons located at the bottom right of the form.

The End of the Review Period date should be selected as the final day of the 6 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/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 Comments	
How has the curriculum coverage developed since the last review?: *	
Please comment on the curriculum coverage in relation to the stage of training and current post: *	
On which areas of the curriculum does the trainee now need to focus their attention before their next review?: *	

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.

Skills Log Comments	
Given the trainee's current level of experience, please comment on their coverage of the mandatory skills: *	
On which skills does the trainee now need to focus their attention before their next review: *	

The next section allows you to comment directly on the trainee's Skills Log. This is how you keep track of their DOPS coverage. The trainee needs to have completed the 8 Mandatory DOPS by the end of their training. You can note how they are progressing and advise the trainee what areas to work on.

Review of PDP	
Please comment on the quality of the PDP: *	
Please comment on the progress made towards agreed objectives: *	
Which objectives remain outstanding?: *	

Next are the PDP comments - You can note how they are progressing and advise the trainee what areas to work on.

The next sections are the Competence Areas comments from the Trainee's self-rating and the Competence Areas comments section for the Educational Supervisor.

Competence area: Practising holistically

Rating: * NFD - Meets Expectations	Trainee's Response
Date: 05/11/2014 15:53	Rating: NFD - Meets Expectations
Evidence to Support Rating (Please explain why the evidence supports your assessment. If you consider further evidence is required to fully demonstrate your assessment of the trainee's progression in this area, you may select up to a further 3 pieces of additional evidence to support your rating below): *	Date: 02/10/2013 10:44
Previous evidence from the last review:	Evidence to support Rating: qwF5rchg
Agreed Actions before next Review: *	Previous evidence from the last review:
Link to PDP: <input type="checkbox"/>	Actions before next Review: hhhhhhhhhhhh
Evidence: (If you would like to select additional evidence to support your rating, please do so here. NB, this is optional, not a requirement)	Tagged Learning Evidence
There is currently no tagged evidence to display	There is currently no tagged evidence
Does the ES agree that the evidence the trainee has provided demonstrates sufficient progression in the current review period?: *	

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 5 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.

The final 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 learning plan for the next review (a minimum of three, which will copy in to the trainee's PDP).

Quality of Evidence Presented

Please comment on the range and quality of the evidence presented by the trainee: *	zx czx
Please comment on the degree of meaningful reflection shown in the learning log & PDP entries: *	dsv fxsv
How can the trainee improve the quality of evidence presented before their next review?: *	sfdv df bv

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?: * Yes No

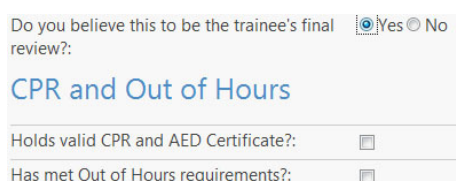
If yes, are you aware if it has / these have been resolved satisfactorily with no unresolved concerns about this trainee's fitness to practice or conduct?: * Yes No

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 4 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 6-monthly reviews.

None given
None given
Satisfactory progress
Unsatisfactory progress
Panel opinion requested
Out of Post

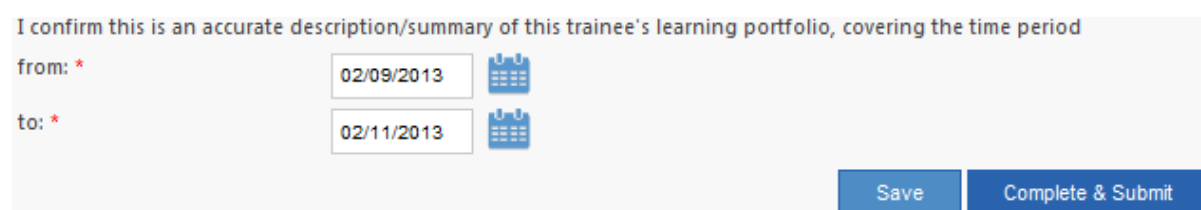
COMPLETING THE REVIEW



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 and CPR/AED requirements. These should only be looked at for the **FINAL REVIEW**. This screen gives you the option to mark CPR/AED as achieved. This will appear ticked or unticked across all reviews, so you may see this ticked for a review other than the final review. If the trainee has achieved these requirements, these boxes should be left.

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.

Both of these 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 send a message to the trainee that they have a review pending for them to accept. They will allow them to read this review and countersign it. Once they have accepted 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.

Setup Review

End of review period: * 02/11/2013

Type of Review: * ST1

During post: * 02/09/2013 to 09/11/2013 ST1/(Geeks) St Georg

Location: * London

Review number: 1

Out of Post?:

Out of Post reason:

Save Save and Continue

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.

CURRICULUM COVERAGE

The review process has these main sections:

- Curriculum coverage
- Review of skills log
- Review of PDP
- Assessment against the professional competence areas

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 Statement Headings			
Name	Linked Learning Logs In Current Review	Linked Learning Logs In Current ST Year	Linked Learning Logs Total
2.01 The GP Consultation in Practice	4	36	36
2.02 Patient Safety and Quality of Care	3	33	33
2.03 The GP in the Wider Professional Environment	0	10	10
2.04 Enhancing Professional Knowledge	7	25	25
3.01 Healthy People: promoting health and preventing disease	2	9	9
3.02 Genetics in Primary Care	2	3	3
3.03 Care of Acutely Ill People	0	8	8
3.04 Care of Children and Young People	0	11	11
3.05 Care of Older Adults	2	6	6
3.06 Women's Health	0	7	7
3.07 Men's Health	0	7	7
3.08 Sexual Health	1	6	6
3.09 End-of-Life Care	3	4	4
3.10 Care of People with Mental Health Problems	2	7	7
3.11 Care of People with Intellectual Disability	1	2	2
3.12 Cardiovascular Health	3	9	9
3.13 Digestive Health	4	12	12
3.14 Care of People Who Misuse Drugs and Alcohol	1	3	3
3.15 Care of People with ENT, Oral and Facial Problems	0	8	8
3.16 Care of People with Eye Problems	1	4	4
3.17 Care of People with Metabolic Problems	2	6	6
3.18 Care of People with Neurological Problems	1	3	3
3.19 Respiratory Health	0	5	5
3.20 Care of People with Musculoskeletal Problems	1	9	9
3.21 Care of People with Skin Problems	0	7	7

[Expand Curriculum Statement Headings 2010](#)

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.

<u>Learning Log</u>	<u>Date</u>
cataract	09/11/2013
Cardiology	05/12/2013
CARDIOLOGY	05/12/2013
medical complexity	20/04/2014
End of life care	22/04/2014
neurology	22/04/2014
pernicious anaemia	14/05/2014

..... Click on the tile of the log entry to review and validate. For more information on the shared entries, please see pages 13 to 17.

SKILLS LOG

The skills log page shows a summary of the DOPS assessments completed. As a trainer you can view this as needed and see the results for the trainee. Click on 'Skills Log' on the left hand menu.

Competence Areas							Curriculum Coverage	Skills Log	Workplace Based Assessment	Page 3 of 4
Mandatory skills										
Procedure	DOPS Present	Satisfactory DOPS	Trainee Self Rating	Trainee Comment	Dated	Has Attachments	View			
Breast examination	1	1	Can perform unsupervised	have done many times	01/04/2013		View			
Female genital examination	1	1	Can perform unsupervised	CAN PERFORM UNSUPERVISED	25/03/2013		View			
Male genital examination	1	1	Can perform unsupervised	CAN PERFORM UNSUPERVISED	17/02/2011		View			
Rectal examination	2	2	Can perform unsupervised	CAN PERFORM UNSUPERVISED	25/03/2013		View			
Prostate examination	1	1	Can perform unsupervised	can perform unsupervised	27/04/2013		View			
Cervical cytology	1	1	Can perform unsupervised	can perform unsupervised	06/05/2013		View			
Testing for blood glucose	1	1	Can perform unsupervised	can perform it unsupervised	15/02/2011		View			
Application of simple dressings	1	1	Can perform unsupervised	can perform unsupervised	25/03/2013		View			
Optional Skills										
Procedure	DOPS Present	Satisfactory DOPS	Trainee Self Rating	Trainee Comment	Dated	Has Attachments	View			
Cryotherapy	0	0	Insufficient evidence							
Curettage/Shave excision	0	0	Insufficient evidence							
Cauterisation	0	0	Performed supervised	I have removed a skin tag and cauterised today 12/04/12...	12/04/2012		View			
Incision and drainage of abscess	0	0	Can perform unsupervised	awaiting Dops	27/04/2011		View			
Aspiration of effusion	0	0	Insufficient evidence							
Excision of skin lesions	0	0	Insufficient evidence							
Proctoscopy	0	0	Insufficient evidence							
Joint and peri-articular injections	0	0	Insufficient evidence							
Hormone replacement implants of all types	0	0	Insufficient evidence							
Suturing of skin wound	1	1	Can perform unsupervised	i ahve done suturing--Dops awaited	27/04/2011		View			
Ability to take skin surface specimens for mycology	0	0	Insufficient evidence							
Other Skills										
Procedure	DOPS Present		Satisfactory DOPS							
Other	5		5							

The 'DOPS Present' column shows the number of DOPS submitted for that skill. If you wish to view the assessment 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. They will rate themselves and add comments.

The trainee skills are split into three sections: Mandatory, Optional and Other (previously foundation). These will need to be checked prior to the review to make sure that necessary skills have a rating.



The Skills Log rating is a trainee self assessment and is not affected by submitted DOPS.

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.

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.**

Competence Areas - Trainee							
<p>Trainees are asked to self-rate against the 12 professional competence areas. Exploring the self-rating is a useful starting point for the review discussion. In preparing for their educational review, trainees should rate their progression across the twelve areas of competence with reference to the evidence in their Portfolio – this will both aid their reflection skills and also allow educational supervisors to base their comments on the evidence offered.</p>							
Relationship							
The doctor's ability to understand and develop human relationships principally with patients, families, colleagues and teams.							
Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit	View
Communication and consultation skills					0		View
Practising holistically					0		View
Working with colleagues and in teams					0		View
Diagnostics							
The doctor's ability to gather and use information to make decisions, particularly within a clinical context.							
Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit	View
Data gathering and interpretation					0		View
Making a diagnosis/decisions					0		View

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.

Competence Areas						
Competence	Linked Learning Logs In Current Review	Linked Learning Logs In Current ST Year	Linked Learning Logs Total	Linked Forms In Current Review	Linked Forms In Current ST Year	Linked Forms Total
1 Communication and consultation skills	<u>13</u>	<u>13</u>	<u>33</u>	<u>3</u>	<u>3</u>	<u>14</u>
2 Practising holistically	<u>7</u>	<u>7</u>	<u>22</u>	<u>4</u>	<u>4</u>	<u>14</u>
3 Data gathering and interpretation	<u>3</u>	<u>3</u>	<u>28</u>	<u>6</u>	<u>6</u>	<u>25</u>
4 Making a diagnosis/decisions	<u>2</u>	<u>2</u>	<u>22</u>	<u>6</u>	<u>6</u>	<u>25</u>
5 Clinical management	<u>2</u>	<u>2</u>	<u>19</u>	<u>6</u>	<u>6</u>	<u>25</u>
6 Managing medical complexity	<u>6</u>	<u>6</u>	<u>18</u>	<u>3</u>	<u>3</u>	<u>11</u>
7 Primary care admin and IMT	<u>1</u>	<u>1</u>	<u>6</u>	<u>1</u>	<u>1</u>	<u>4</u>
8 Working with colleagues and in teams	<u>5</u>	<u>5</u>	<u>31</u>	<u>4</u>	<u>4</u>	<u>14</u>
9 Community orientation	<u>4</u>	<u>4</u>	<u>16</u>	<u>3</u>	<u>3</u>	<u>10</u>
10 Maintaining performance, learning and teaching	<u>3</u>	<u>3</u>	<u>24</u>	<u>3</u>	<u>3</u>	<u>14</u>
11 Maintaining an ethical approach	<u>5</u>	<u>5</u>	<u>19</u>	<u>6</u>	<u>6</u>	<u>24</u>
12 Fitness to practise	<u>7</u>	<u>7</u>	<u>27</u>	<u>6</u>	<u>6</u>	<u>25</u>

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.

Linked Learning logs evidence for Community orientation for Review	
Name	Date
Learning log: Prolonging pain	09/10/2014
Learning log: Extra confirmation	28/09/2014
Learning log: Language barrier	28/08/2014
Learning log: Fertility Clinic	07/08/2014

[Close](#)

Linked Forms evidence for Community orientation for Review	
Name	Date
CbD: Post-op Review of 4th Degree Perineal Tear	23/10/2014
CbD: Bleeding in early pregnancy	21/10/2014
CSR: Sunetra Sengupta	22/10/2014

[Close](#)

ASSESSMENT AGAINST THE PROFESSIONAL COMPETENCE AREAS - RECORD COMPETENCES

This section shows the educational supervisors' ratings and comments for the trainee. This is available to trainers to view only.

The trainee will be required to self assess before the educational supervisor records their comments and ratings. For instructions on recording competences please see page 44.

In each of the 12 competence areas, firstly use the word pictures to decide whether the trainee is NFD/Competent/Excellent. If 'NFD', you can then rate the trainee in comparison with doctors at the same stage of training

Relationship

The doctor's ability to understand and develop human relationships principally with patients, families, colleagues and teams.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Communication and consultation skills					0	Edit
Practising holistically					0	Edit
Working with colleagues and in teams					0	Edit

Diagnostics

The doctor's ability to gather and use information to make decisions, particularly within a clinical context.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Data gathering and interpretation					0	Edit
Making a diagnosis/decisions					0	Edit
Clinical management					0	Edit
Managing medical complexity					0	Edit

Management

The doctor's ability to manage issues, events, relationships and him/herself over time.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Primary care admin and IMT					0	Edit
Community orientation					0	Edit
Maintaining performance, learning and teaching					0	Edit

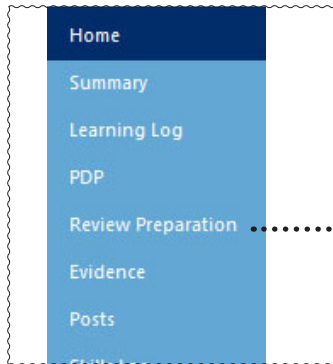
Professionalism

The attitude that the doctor has about the responsibilities of the job, expressed through the level of respect and commitment demonstrated for people, professional guidelines and duties.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Maintaining an ethical approach					0	Edit
Fitness to practise					0	Edit

TRAINER REVIEW FUNCTIONS

Trainers are able to 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.

[« Return to previous page](#)

End Of Review Period	Review Type	Outcome	Self Rating Complete	Is Accepted By Trainee	View
01/10/2014	ST1-1	Satisfactory progress	✓	✓	View Download
01/04/2015	ST1-2				

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

ST1-1 Review for Jenny Williams 

[« Return to previous page](#)

Please Note: To help increase performance during peak periods, the review has been divided into 4 parts. You can navigate between them by using the links at the top and bottom of the page.

[Competence Areas](#)
[Curriculum Coverage](#)
[Skills Log](#)
[Workplace Based Assessment](#)

Personal Details

Trainee Name: Dr Jenny Williams
GMC number: 20010
Route: Unknown
GMC Programme/Post Approval Number: ST1/(Geeks) London Specialty School of General Practice/Accident & Emergency/Full Time
Training number: ---
Training Programme: (Geeks) Greater London
Name of Person Submitting Report: Patrick Oshea
Position: Educational Supervisor

Declarations

Declaration	Signed By	Countersigned	Signed
Probity: Professional Obligations	Trainee	Not required	08/08/2013 10:01
Health: Professional Obligations	Trainee	Not required	08/08/2013 10:04

CURRICULUM DOCUMENTS

Functions Available

- [View Curriculum Documents](#)

[Legals](#) | [FAQs](#) | [Resources](#) | [Contact Us](#) | [RCGP Main Website](#)

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

↓
To view the items, click on the title to open.

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

Posts

Skills Log

Curriculum Coverage

Educators' Notes

Competence Areas

Progress to Certification

Downloads

The Download section allows you to download sections of your Trainees' 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.



Trainee	Roles	Dates	Details
Gp Trainee4	Educational Supervisor	02/08/2008-02/12/2008	Details
Gp TraineeA	Educational Supervisor Trainer or Clinical/Academic Supervisor	03/02/2013-03/08/2016	Details
Gp TraineeE	Educational Supervisor Trainer or Clinical/Academic Supervisor	01/08/2009-31/07/2011	Details
John Trainee	Educational Supervisor	23/10/2010-23/04/2011	Details

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 4 page review the trainee and ARCP sees. This combines your comments with the respective parts of the ePortfolio.
- ARCP's - the individual ARCP forms for the Trainee.

Records will be exported as a PDF file.

FREQUENTLY ASKED QUESTIONS (FAQs) AND HELP

Functions Available

- View FAQs
- View Help Files

[Legals](#) | [FAQs](#) | [Resources](#) | [Contact Us](#) | [RCGP Main Website](#)

To read any of the frequently asked questions, click on the item to display its contents.

*** Frequently Asked Questions**

01. Assessments - how do I get them completed?
02. Curriculum – what do I need to learn?
03. Declarations and Agreements - how do I sign them?
04. Educational Supervisor and Trainer – how can I contact them?
05. Educational Supervisor, Trainer and Posts - How do I add them?
06. Adding the Postgraduate Dean/Responsible Officer
07. How do I add meetings or appraisals that are not the six monthly review?
08. How do I change my userid?
09. How do I change personal details?
10. Download the ePortfolio
11. If I validate a record my trainee shares with me, does this mean I have deemed them competent.
12. Keeping parts of the ePortfolio private – which parts and how do I do this?
13. Linking to Learning Logs and PDP
14. MSF - How to get one done
15. How do I obtain Ticket Codes for Assessments
16. MSF/PSQ How do I view the feedback and summary?
17. OOH – how do I record Out of Hours/CPR?
18. Password – how do I change this?

Enquiries

Download

FAQs

Help

Switch Role:

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:

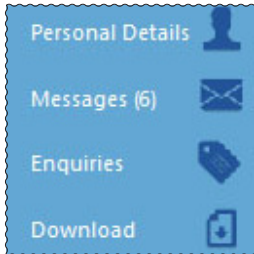
Search

These help files contain extra information in the form of powerpoint slides, word documents, pdfs or pictures. Select the media type you require by clicking the icon.

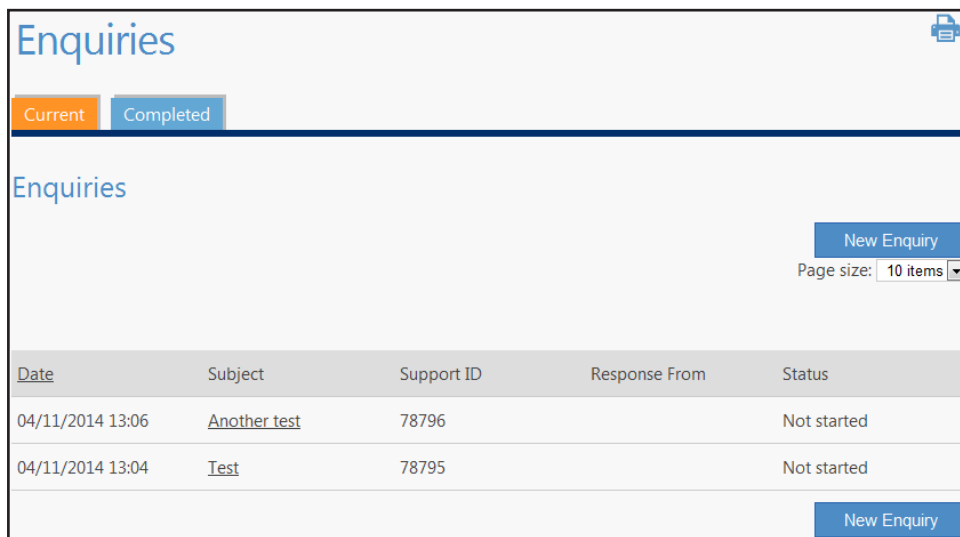
ePORTFOLIO ENQUIRIES

Functions Available

- View existing support enquiries
- Create new enquiries



ePortfolio Enquiries allows all users to log any enquiries that they may have about the system. Any questions that appear regularly will be added to the FAQs.

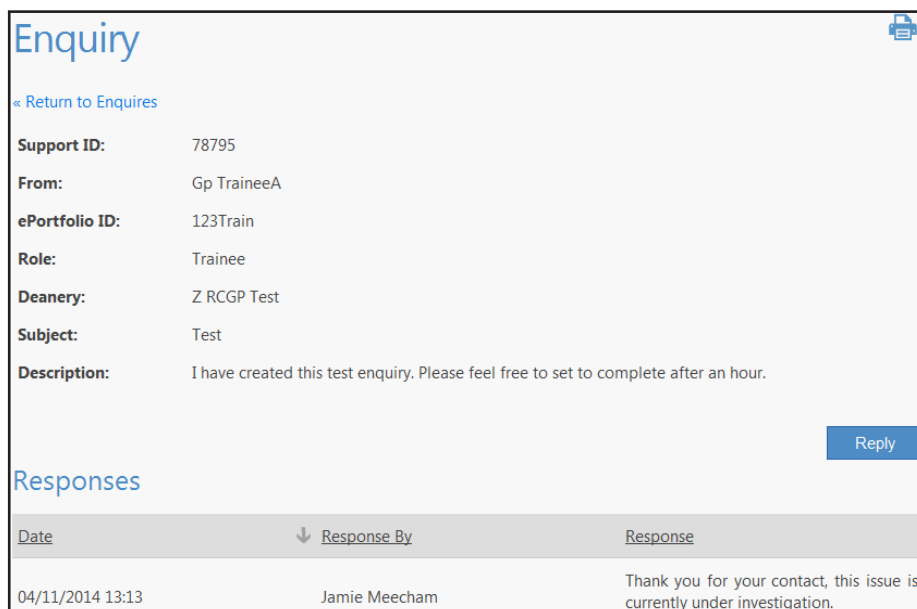


The screenshot shows the 'Enquiries' page with two tabs: 'Current' and 'Completed'. Below the tabs is a table of enquiries. The table has columns for Date, Subject, Support ID, Response From, and Status. There are two rows of data. A 'New Enquiry' button is visible in the top right corner, and a 'Page size: 10 items' dropdown is also present.

Date	Subject	Support ID	Response From	Status
04/11/2014 13:06	Another test	78796		Not started
04/11/2014 13:04	Test	78795		Not started

On this screen you can view current and completed support logs (use the tabs to navigate between these).

To view an enquiry that you have open, click on the subject title to open the log.



The screenshot shows the 'Enquiry' details page. It includes a 'Return to Enquiries' link and a list of fields: Support ID, From, ePortfolio ID, Role, Deanery, Subject, and Description. Below the fields is a 'Reply' button. At the bottom, there is a 'Responses' section with a table showing the date, response by, and the response text.

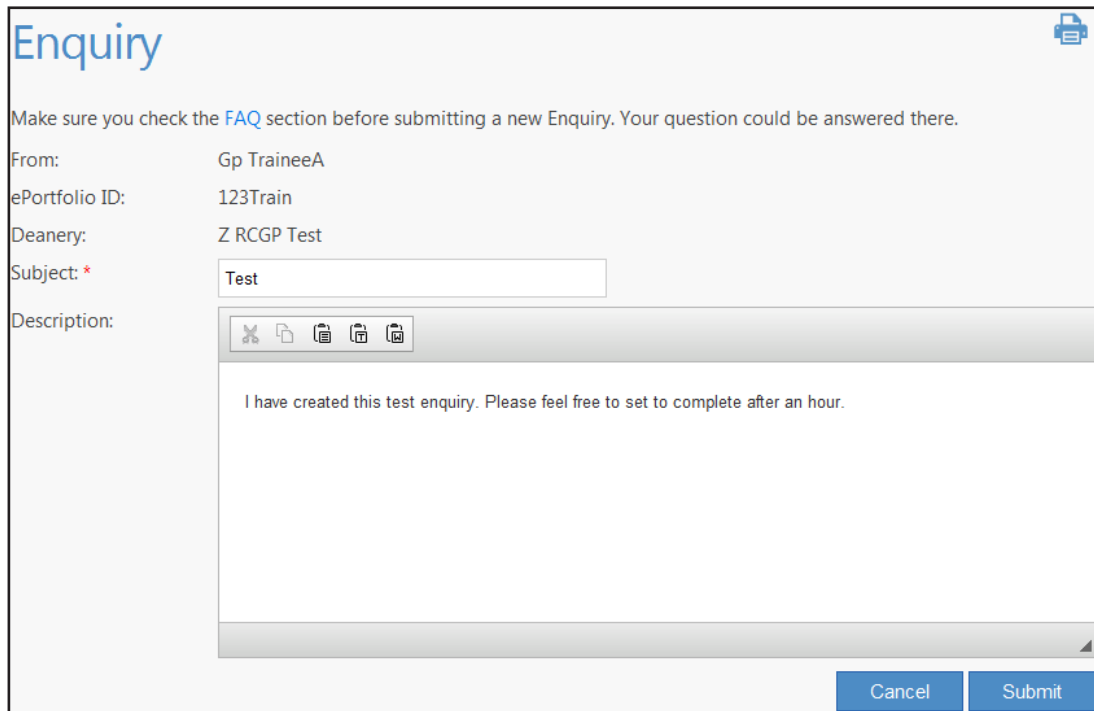
Support ID: 78795
From: Gp TraineeA
ePortfolio ID: 123Train
Role: Trainee
Deanery: Z RCGP Test
Subject: Test
Description: I have created this test enquiry. Please feel free to set to complete after an hour.

Responses

Date	Response By	Response
04/11/2014 13:13	Jamie Meecham	Thank you for your contact, this issue is currently under investigation.

CREATE NEW ENQUIRIES

1. Click on 'Enquiries from the left hand menu then the 'New Enquiry' button.
2. This will open up a new page which allows you to input the enquiry .



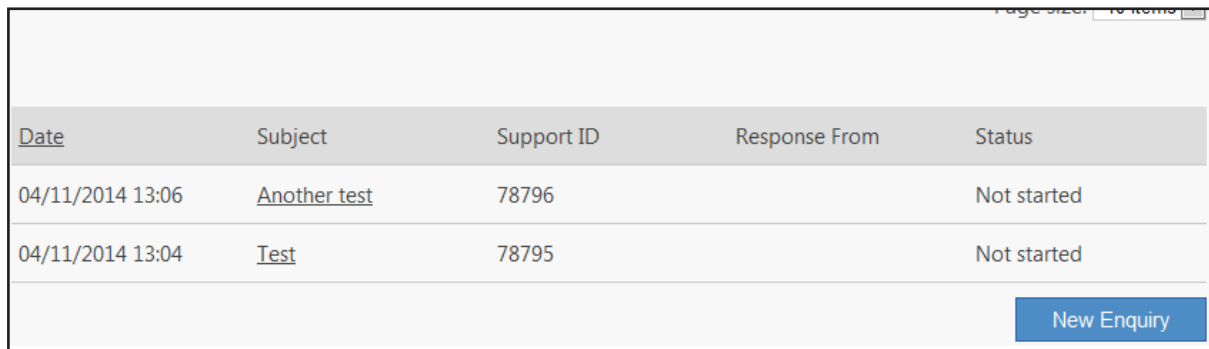
Enquiry

Make sure you check the [FAQ](#) section before submitting a new Enquiry. Your question could be answered there.

From: Gp TraineeA
ePortfolio ID: 123Train
Deanery: Z RCGP Test
Subject: *
Description:

I have created this test enquiry. Please feel free to set to complete after an hour.

3. Input the subject and message that you would like to log.
4. Click 'Submit'.
5. The screen will refresh to display that the enquiry has been logged with a corresponding reference number.



Date	Subject	Support ID	Response From	Status
04/11/2014 13:06	Another test	78796		Not started
04/11/2014 13:04	Test	78795		Not started

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 here to read and sign the Agreement.

Declarations			
Declaration	Signed By	Signed	Countersigned
Probity: Professional Obligations	Trainee		Not required
Health: Professional Obligations	Trainee		Not required
Educational Agreement	Trainee	07/11/2014 15:30	Click here to sign ←
			Historical Declarations

- 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.

[Sign](#)



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 24) 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'.

The screenshot shows the MSF interface for 'John Trainee'. At the top, there is a header 'John Trainee'. Below it, there are two dropdown menus: 'Review' set to 'ST2' and 'Review Number' set to '2'. A text label indicates 'Forms submitted between 19/09/2010 and 22/04/2011'. Below this is a navigation bar with tabs: 'Summary', 'MSE', 'miniCEX', 'DOPS', 'CbD', 'COT', 'PSQ', and 'CSR'. The 'MSE' tab is selected. Underneath, there is a section titled 'MSF' with the subtitle 'RCGP Multi Source Feedback'. Below this, there is a 'Submissions (5)' section with a 'View a blank form' link. A button with a bar chart icon and the text 'Analyse Submissions' is circled in red. A link 'Preview just for information' is also visible.

5. Click on the 'Analyse Submissions' button.
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.

The screenshot shows the 'Educational Supervisor comments for the trainee' section. The text '(these will be viewed by the trainee with the graph summary)' is displayed above a large text area for comments. Below the text area, there is a 'Confirmation:' label followed by a dropdown menu. The dropdown menu is open, showing three options: 'Not Released', 'Not Released', and 'Release scores to Trainee'. A 'Confirm' button is located to the right of the dropdown menu.

VIEW AND RELEASE PSQ

After a valid review has been created (see page 24) 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'.

Evidence

Review Type: Review number:

Summary MSF **PSQ** miniCEX DOPS CbD COT CSR

Patient Satisfaction Questionnaire

Forms submitted between 24/04/2013 and 18/12/2014

RCGP Patient Satisfaction Questionnaire

Code	Submissions	Status	Date	Minimum Submissions Required	Summary
3TKR9KTC	40	Summarised	17/01/2014 to 28/02/2014	0	Summary
U3UTE5UU	40	Released	03/12/2013 to 14/01/2014	0	Summary
A916C001	0	Not submitting	14/05/2013 to 25/06/2013	40	

View a blank form [Preview](#)

Print a blank form [Blank Form](#)

For this review PSQ (if not yet completed in ST3)

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 are viewed by 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.

negative about your problems)

8. Explaining things clearly... (fully answering your questions, explaining clearly, giving you adequate information; not being vague)	1	7	3	3
9. Helping you to take control... (exploring with you what you can do to improve your health yourself; encouraging rather than "lecturing" you)	1	7	3	3
10. Making a plan of action with you... (discussing the options, involving you in decisions as much as you want to be involved; not ignoring your views)	1	7	3	3
11. Overall, how would you rate your consultation with this doctor today?	1	7	3	3

Comments

Educational Supervisor comments for the trainee (these will be viewed by the trainee with the graph summary):

Confirmation: * Release Scores to Trainee Not Released

Save

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.

In each of the 12 competence areas, firstly use the word pictures to decide whether the trainee is NFD/Competent/Excellent. If 'NFD', you can then rate the trainee in comparison with doctors at the same stage of training

Relationship
The doctor's ability to understand and develop human relationships principally with patients, families, colleagues and teams.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Communication and consultation skills					0	Edit
Practising holistically					0	Edit
Working with colleagues and in teams					0	Edit

Diagnostics
The doctor's ability to gather and use information to make decisions, particularly within a clinical context.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Data gathering and interpretation					0	Edit
Making a diagnosis/decisions					0	Edit
Clinical management					0	Edit
Managing medical complexity					0	Edit

Management
The doctor's ability to manage issues, events, relationships and him/herself over time.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Primary care admin and BMT					0	Edit
Community orientation					0	Edit
Maintaining performance, learning and teaching					0	Edit

Professionalism
The attitude that the doctor has about the responsibilities of the job, expressed through the level of respect and commitment demonstrated for people, professional guidelines and duties.

Competence Area	Rating	Dated	Evidence	Actions	No Of Tagged Evidence	Edit
Maintaining an ethical approach					0	Edit
Fitness to practise					0	Edit

5. Rate the competence using the drop down box.
6. Add any comments you wish to make and any actions required before the next review.
7. Link to the PDP and agreed learning (optional - this copies the text of the 'actions' box in to the agreed learning plan section on the final page - this can only be used for a maximum of 5 entries.)
8. Tag up to 3 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).
10. Click on 'Save'.

Competence area: Practising holistically

Rating: * NFD - Meets Expectations

Dated: 07/11/2014 16:18

Evidence to Support Rating (Please explain why the evidence supports your assessment. If you consider further evidence is required to fully demonstrate your assessment of the trainee's progression in this area, you may select up to a further 3 pieces of additional evidence to support your rating below.)*

Previous evidence from the last review: generates ARCP?

Agreed Actions before next Review: *

Link to PDP:

Evidence: If you would like to select additional evidence to support your rating, please do so here. NB, this is optional, not a requirement

Trainee's Response

Rating:

Dated:

Evidence to support Rating:

Previous evidence from the last review:

Actions before next Review:

Tagged Learning Evidence

There is currently no tagged evidence

Date	Name
<input checked="" type="checkbox"/> 19/12/2013	Learning log: 1
<input checked="" type="checkbox"/> 24/09/2013	Learning log: d
<input checked="" type="checkbox"/> 16/08/2013	Learning log: darcv
<input type="checkbox"/> 04/09/2013	Learning log: Hello
<input type="checkbox"/> 12/09/2013	Learning log: Subject title: *

HELPFUL CONTACT DETAILS

Below are some contacts in case of any errors or problems you encounter with ePortfolio.

WPBA and General ePortfolio Enquiries:

ePortfolio Helpdesk

Email: tep@rcgp.org.uk

Telephone: 020 3188 7655