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NHS e-Portfolio: A quick guide for Foundation Programme Educational Supervisors

Introduction

The Foundation Learning portfolio has been designed to help Foundation Doctors plan and manage their Foundation Programme effectively. Within the portfolio, Foundation Doctors will find tools that will help identify educational needs, set goals and plan how to achieve them. The e-Portfolio is a means of managing the Foundation portfolio online in a secure, password controlled environment. It enables both trainees and supervisors to store evidence of achieving Foundation Curriculum competencies and to check on progress. The e-Portfolio is also used to supervise some doctors in specialty training and therefore may be familiar to some supervisors. Please take special note of the table at the end of this guide which outlines when meetings need to take place and which forms need to be completed and/or reviewed on e-Portfolio and when.

The Home page

The navigation menu is divided into 5 main sections, **Profile**, **Status Reports**, **Trainees**, **Messages** and **Help**, with a drop down menu for each one. It also has a section with alerts from the Post-graduate centre and details on upcoming courses that may be of relevance.

Menu - Profile

Your personal details can be entered and amended and a photo can be uploaded. Your password can be changed if needed.

Menu - Status Reports

- ***Summary report:*** This enables the Educational Supervisor to see how many submissions have been made for each of their trainee's. By default 'Current Posts' is displayed. To view a specific training year, chose the year from the drop down box. Specify the Grade from the drop down box if you wish. Enter 'from' and 'to' dates in the date filter fields to search more specific dates.

Menu - Trainees

By clicking on the 'Trainees' menu header all trainee's under your supervision will be listed. Current trainees are shown by default. Tick to view previous or future trainees. Once a trainee has been selected their e-Portfolio will be displayed. This allows the supervisor to view the trainees **Profile**, **Forms**, **Curriculum** and **Reflection** sections.

- **Profile**
    - ***Personal Details:*** The trainee's personal details and a section for the supervisor to record private Supervisors Notes are located here.
    - ***Post / Supervisor Details:*** The trainee's current posts, all posts and all supervisors who have log in access to their e-Portfolio for the training year are displayed.
    - ***Declarations and Agreements:*** To be read and signed by the trainee and countersigned by the Educational Supervisor at their first meeting of the training year.

- ***Certificates:*** Certificates can be viewed and verified by the Educational Supervisor or PG Centre either by seeing the paper or uploaded electronic version and then clicking on the confirm link.
- ***Personal Library:*** This section can be used to view the trainee's personal library which houses any stored documents chosen by the trainee.
- ***Absences:*** Displays any absences declared by the trainee.
- ***Courses and Seminars:*** Displays courses and seminars relevant to the trainee.
- ***Attention Items*** ⚠ *:* These would either be a score of 1 or 2 given to any question by the assessor on submitted assessments, or if the assessor answered 'YES' to the Probity and Health question on any of the submitted assessments. Low scores should be monitored by the Educational Supervisor. Probity and Health issues need to be addressed by the Educational Supervisor.

  To remove an Attention Item:

1. Click 'Edit' to the right of the Attention Item to be removed.
2. Enter the reason for removing the Attention Item in the Notes box.
3. Tick the box so that a green tick appears ✓ and click the Save button.
4. To make a comment linked to the actual assessment form i.e. to note that you followed up the Probity and Health issue which was made by mistake, click the link icon next to the assessment in question and make a comment. This comment will appear linked to the assessment form.

- **Forms**
  - ***Summary Overview:*** This contains a summary of all the electronic forms completed for a trainee's current and previous posts. Submitted forms can be viewed by clicking on the number of submissions link, and new forms can be created by clicking on the create link.
  - ***Work-Based Assessments:*** All the current and previous assessments submitted for the trainee can be viewed here.

! ***MiniPAT Summary:*** Educational Supervisors need to release their trainee's individual Mini-PAT Summary to them before the end of placement meeting with their trainee. Do this by clicking on the 'Summary Rater Form mini-PAT (Peer Assessment Tool)' link and selecting which forms are to appear in the summary. The Mini-PAT Summary table will be generated and comments from assessors will appear below the table. Next choose to 'Release the Summary to the Trainee' from the drop down box at the bottom of the page. The summary needs to be discussed with your trainee at the end of placement meeting. If you do not release the summary, your trainee will not receive any Mini-PAT feedback!

- ***Request External Assessment button:*** Use this button to request that someone other then yourself complete an assessment on your trainee.
  1. When you click the 'Request External Assessment' button you will be taken to a page listing all nominated assessor requests that have been made by/for your trainee. A ✓ means the assessment has been submitted a ✗ means it has not.
  2. Click the 'Request New Assessment' button. Select the post from the drop down box.
  3. Select the requested assessment(s) and fill in the nominated assessors details.
  4. Click 'Generate Ticket'. The Ticket/unique log in code will appear on screen. If an e-mail address was entered the Ticket

will be e-mailed to the recipient. If not, the Ticket/unique log in code can be printed and handed to the nominated assessor.

    - ***Add New Assessment:*** Click this button to complete an assessment form on your trainee. Please make sure the correct post is chosen from the drop down box. Click the create link next to the desired assessment.

- **Completing an assessment for an external trainee:** Instructions for completing an assessment form on a trainee whose e-Portfolio you do not have access to. If you do not have an opportunity to complete the assessment form after the assessment occurs (through the trainee's log in), the trainee will forward you a request to complete the assessment form via a unique ticket code.
    1. Enter the unique 10-digit log in code into the Assessors section of the e-Portfolio log in page, if given to you by the trainee. If an e-mail request is received, click the link to go directly to the assessment to be completed.
    2. Confirm/enter your personal details and the assessments details.
    3. Complete the assessment and click save. Make sure to click Log Out at the end to ensure the assessment is saved and submitted!!

    - ***Educational Supervision / Meetings:*** This page displays meetings and forms created for your trainees current and previous posts. To add a new Meeting or Form, click the 'Add New Meeting or Form' button. Please make sure the correct post is chosen from the drop down box. Click the create link next to the desired meeting or form. The **End of Placement Final Review Form** must be completed with your trainee during the meeting which takes place between their previous and next placement. Reviewing your trainee's Supervisor Report, completed by their previous placements Clinical Supervisor, will aid you in completing the End of Placement Final Review Form with your trainee.
    - ***Target Timeline:*** The table gives a timeline of the assessments, self appraisals and meeting forms that must be completed during the trainee's current post and the trainee's progress against it. Please see Page 4 of this document for details of the total number of assessments a trainee needs to complete for the entire year to be signed off.
    - ***Self Appraisals:*** This section displays the current and previous posts Self Appraisal forms completed by the trainee for review with their supervisors.

- **Curriculum**

This section is used by the trainee to show evidence of achieving Foundation Curriculum competencies. The Educational Supervisor is to review and ensure their trainee's are linking (assessments, PDP's, educational log entries, meeting forms etc.) to their Foundation Curriculum. Click on the competency to view and/or make a rating/comment and/or view details of the competency.
Anytime you see the link icon next to an item within your trainee's e-Portfolio you can click on the icon to see if/what they have linked to the item. You can also make a comment and add a signature to the specific e-Portfolio item using the link icon.

- **Reflection**
    - ***Educational Logs**:* Trainees can record a variety of clinical, educational or ethical scenarios and use them to illustrate reflective practice. If the trainee

has allowed for these entries to be shared, the Educational Supervisor can view and add a comment and/or signature.
   - ***Personal Development Plan****:* Trainees use this section to develop their own personal development plan (PDP), creating at least one PDP per post which must be agreed with the supervisor. If the trainee has allowed for the plan to be shared, the supervisor can view and add a comment and/or signature.
   - ***Careers management****:* A history of any careers discussions that were recorded by the trainee are saved here.

Menu - Messages
This section allows messages to be sent and received between e-Portfolio accounts. The function works similarly to outlook. Messages and attachments can be sent to administrators, supervisors or trainees within your trust individually or by creating groups. Messages can also be sent to any member with an e-Portfolio account by searching by name under the 'User Search' tab.
Note: When you log into your e-Portfolio account, on the Home page under Quick links the number of new messages will appear in bold Messages **(1)**.

Menu - Help
This section contains useful information on the Foundation Programme and how to use the e-Portfolio.

- ***Information:*** Contains important information on the use of e-Portfolio. Make special note of the *Guide for Supervisors in the Foundation Programme* document and the *Overview of Foundation Programme meetings and forms chronologically* table which outlines when meetings and forms on e-Portfolio need to be completed between the trainee and supervisors. This page will constantly be updated.
- ***Access Rights:*** This page outlines the access rights each role of user has to the trainee's portfolio.
- ***FAQ:*** This page contains useful frequently asked questions.
- ***Support:*** Use this page to contact e-Portfolio support if you are having any technical problems. Educational support should be directed to the Post grad centre.
- ***User Guides:*** Contains the PDF version of the *Educational Supervisor / Clinical Supervisor / Foundation Programme Director / Tutor user guide*.
- ***About eportfolio:*** This page contains information about e-Portfolio including some definitions.
- ***Release Notes:*** This page contains links to the Release Notes. The Release Notes contain details of pending or implemented updates to e-Portfolio and the date they plan to be or were released.

Target Timeline:

Post 1 1st 4 months **End of November**	**Post 2** 4 – 8 months **End of March**	**Post 3** 8 – 12 months **End of May**
Mini-CEX x 2	**Mini-CEX x 2**	**Mini-CEX x 2**
DOPS x 2	**DOPS x 2**	**DOPS x 2**
CBD x 2	**CBD x 2**	**CBD x 2**
Mini-PAT	**Mini-PAT**	**Mini-PAT (if required)**

The minimum number of assessments a trainee must complete by end of year sign off

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CHRONOLOGY, RESPONSIBILITY AND DOCUMENTATION FOR SUPERVISION OF FOUNDATION DOCTORS BY EDUCATIONAL AND CLINICAL SUPERVISORS

Meetings ⇨

	Placement 1 Aug - Nov						Placement 2 Dec - March							Placement 3 April - July							
	Foundation Doctor	Educational Supervisor	Clinical Supervisor	Clinical Supervisor	Foundation Doctor	Clinical Supervisor	Foundation Doctor	Educational Supervisor	Clinical Supervisor	Educational Supervisor	Clinical Supervisor	Foundation Doctor	Clinical Supervisor	Foundation Doctor	Educational Supervisor	Clinical Supervisor	Clinical Supervisor	Educational Supervisor	FTPD	Foundation Doctor	Clinical Supervisor
	Aug	Aug	Aug	Oct	Nov	Nov	Dec	Dec	Dec	Feb	Feb	Mar	Mar	Apr	Apr	Apr	May	Sign off	Sign off	July	July
Induction Meeting Form			C						C							C					
Mid-point Review Form				C						C-Year	C						C				
End of Placement Final Review Form								C	R						C	R		C			
Supervisors Report Form (ticketing)						C		R	R				C		R	R	C	R			
ES report to FTPD (Local Form)*																		C	R		
Educational Agreement Form	C	C																R			
Foundation Curriculum & Linking	Continue reviewing the Foundation Curriculum, making comments and Linking items within the portfolio to the Curriculum providing evidence that competencies have been achieved																				
Self Appraisal Form	C	R	R				C	R	R	R				C	R	R		R			R
Personal Development Plan Form		C	R	R		R		C	R	R	R		R		C	R	R	R			R
Foundation Doctor Portfolio		R						R		R					R			R	R		
Progress/Assessment Review				R		R		R	R	R	R		R		R	R	R	R	R		R
Mini-PAT Summary released on ePortfolio							R	C						R	C						
Attendance at formal educational events				R				R		R	R				R		R	R	R		R
Career Management (incl. F1-Plans for F2 Taster; F2- ST application)	C	C	R			R	C	C	R	R			R	C	C	R		R			R
Educational Logs (Reflective Practice)	Continue recording reflective practice through Educational Log entries and Linking them to the Foundation Curriculum if it is felt that a competency has been achieved																				
Self Appraisal of Learning Form					C	R		R				C	R		R			R		C	R
Sign off FY1/FY2 (FS Procedure)																			C		

F T P D

Key: ES-Mandatory ES - Optional CS - Mandatory CS - Optional ***C*** *–Complete* ***R*** *– Review* * *not available on ePortfolio, ask FTPD*