ePortfolio
User Guide for Supervisors

JRC **PTB**

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Contents

1. Introduction

The JRCPTB ePortfolio allows evidence to be built up to inform decisions on a trainee's progress and provides tools to support trainees' education and development.

The JRCPTB ePortfolio is part of a shared service used by many foundation schools and other colleges. Trainees will be able to use the same username and password as they progress through Foundation, Core Medical Training and specialty training. A new version of the ePortfolio was released in August 2008 and the ePortfolio will be subject to further improvements and additions.

The administration, such as setting up users and posts, has currently been devolved through the deaneries to trusts in most cases. If you have an enquiry about the ePortfolio, your first port of call should be your Postgraduate Education Centre. When we refer to "local administrator" in this guide, we would usually expect it to be someone in your Postgraduate Education Centre.

The trainee's main responsibilities are to ensure the ePortfolio is kept up to date, arrange assessments and ensure they are recorded, prepare drafts of appraisal forms, maintain their personal development plan, record their reflections on learning and record their progress through the curriculum.

The supervisor's main responsibilities are to use ePortfolio evidence such as assessments, reflections and personal development plans to inform appraisal meetings. They are also expected to update the trainee's record of progress through the curriculum, write end of attachment appraisals and supervisor's reports.

2. Accessing the ePortfolio

Type in the web address: http://www.nhseportfolios.org

To log in, simply type in your User Name and Password into the login box and click 'Log In.' If you do not have a User Name and Password or are unable to log in with the details you do have, speak to your local administrator.

If you still cannot resolve your problem, email eportfolio@jrcptb.org.uk with your query. If you have forgotten your password, click the 'Forgot Password?' link.

You will be asked for your email address and a temporary password will be sent to you via email.

3. ePortfolio Home Page

Once you have logged in you will need to select which role you have by clicking on the relevant link. As an Educational Supervisor for the JRCPTB ePortfolio, you will need to click on 'Physician Educational Supervisor'.

Select Role

These are the roles that you are currently a member of. Please select one to enter ePortfolio. You can change roles using the Select Role option in the top menu.

Foundation Educational Supervisor   Physician Educational Supervisor

Foundation Tutor   Physician Tutor

Welcome to ePortfolio for Physician Educational Supervisors

Historical ePortfolio View

If you have used NES ePortfolio before (in the previous version) your previous account (showing all saved data) can be accessed using the link below:

View my previous ePortfolio

Search for a trainee

[Search]

Quick links
- Select a trainee
- Individual reports
- Summary reports
- Messages

Alerts

No current alerts

Courses and Seminars

No upcoming Courses or Seminars in your

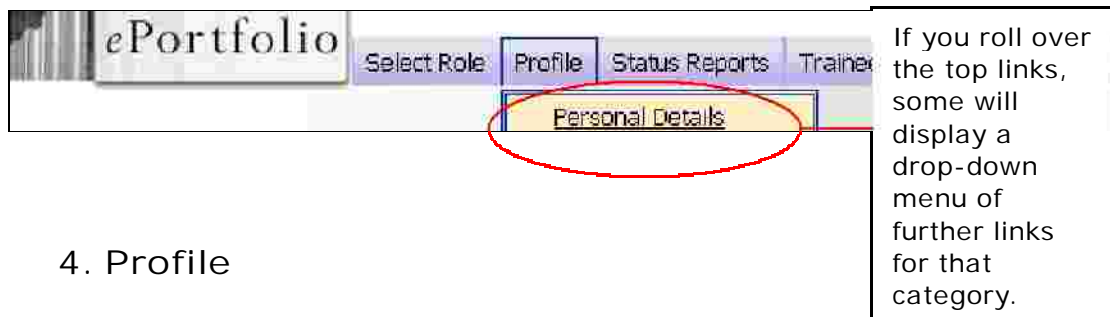On the right-hand side of the home page, you will find some useful 'Quick Links'.

To access trainee records, from before August 2008, click 'View my previous ePortfolio'

In the main area, you can search for one of your trainees.

ePortfolio   Select Role   Profile   Status Reports   Trainees   Messages   Help

When using the ePortfolio, there is a consistent navigation bar at the top.

4. Profile

Personal Details

You are able to check and manage your user profile, by accessing your 'Personal Details' from the profile section.

To make a change to your personal information, click 'Edit Details'.

When updating your user profile, you will find that most information is optional, and not required by JRCPTB.

You can update this at any time but remember to save your changes.

Personal Details

Title	
Forename *	CMT
Surname *	Supervisor
GMC Number	999111
College Number:	
NTN:	
Department	
Email *	cmt_t@gmail.com
Telephone	
Mobile	

If you see an asterisk, this means this is a required field.

Address Details

Address Line 1	
Address Line 2	
Address Line 3	
Town / City	
Postcode	
Country	

Save Changes   Cancel

Remember to click 'Save Changes'.

Photo

The tab 'Photo' to the right of 'Personal Details' allows you to upload a photograph. This is not mandatory.

Current Photo:

Photo Not Uploaded

Select photo to upload:

Select

📂 Upload Photo

To update this photo, click the 'Select' button and choose a file from your local hard-drive. Then click the 'Upload Photo' link.

Valid file types are .jpg, .gif and .bmp. The maximum file size that can be uploaded is 2 MB. The optimal dimensions for the photo are 150px x 200px. If you upload a larger photo, it will automatically be resized to fit these dimensions.

Login Details

The tab 'Login Details' to the right of the photo tab shows you your username and assigned role(s). Note if you have been allocated the wrong role, contact your local administrator.

You are also able to change your password to something more memorable here.

Below are the Login Details on file for this account in ePortfolio. If your assigned Role(s) are incorrect, please contact Support to fix this.

To change your password, enter your Old Password and a New Password below and click the "Change Password" button.

Login Details

Username	supCMTLondon
Role(s)	Physician Educational Supervisor

Change Password

Password length must be between 8 and 14 characters and contain alphanumeric characters only. You must also not use your username in your password.

Old Password	
New Password	
Re-enter New Password	

Change Password

5. Trainee Portfolio

To view information on one of your trainees, click on the 'Trainees' link at the top, then select the trainee from the drop-down menu.

To see a trainee's post details, go to 'Profile' and click 'Post/Supervisor' details.

To navigate through the trainee's ePortfolio, simply use the links on the left.

6. Curriculum

To view a trainee's curriculum progress, click 'Curriculum' in the left links and then select the appropriate curriculum from the side menu. You will be able to see a list of competencies needing to be achieved for that curriculum. You will also be able to see trainee ratings, comments and supporting evidence as appropriate.

Note the trainee's rating and comments are highlighted in green and that they have linked to an assessment as supporting evidence.

To view a pop-up of more information on how a competency can be achieved, click on the 'i' icon.

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

To rate the trainee, select the appropriate rating from the drop-down menu and then add any comments beneath to justify this.

Competency Details

Physician Dermatology
1 Skin Biology

Action	Date	Submitted By	Role	Rating	Comments
Edit Delete	18/03/2009 11:45	Dr Eddie Supervisor	Educational Supervisor	Achieved	Observed trainee recently during a clinical examination... They had an excellent knowldge and applied this well in assessment and management...
	17/03/2009 17:11	Dr Derek Derma	Trainee	Some Experience	I have had some useful experience in this...

Add Rating/Comment

Rating: Achieved

Comments:

The supervisor's rating appears at the top.

Click 'Back to Curriculum' to see the full list with your update.

[Back To Curriculum] [Save]

To ...knowledge of the structure and function of normal skin. The trainee will be able to explain the consequences of skin diseases and the means by which treatment may be effective.

Knowledge	Skills	Attitudes and Behaviour	Teaching and Learning Methods
• Describe anatomy,	• Applies knowledge	• Recognises importance of	• Attend trainee

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Trainee Dr Derek Derma – Physician Dermatology

Competencies

1 Skin Biology
Supervisor Rating: **Achieved**, 18/03/2009 (by Dr Eddie Supervisor)
Supervisor Comment: Observed trainee recently during a clinical examination... They had an exce...
knowldge and applied this well in assessment and management...
Trainee Rating: Some Experience, 17/03/2009
Trainee Comment: I have had some useful experience in this...
Evidence: MiniCEX (17/03/2009 17:09:13)

2 General Dermatology
3 Dermatopathology
4a Contact Dermatitis and Occupational Dermatoses
4b Preparation of Department of Social Security and medico legal reports
4c Prick and intradermal testing
5a Paediatric Dermatology
5b Genetics
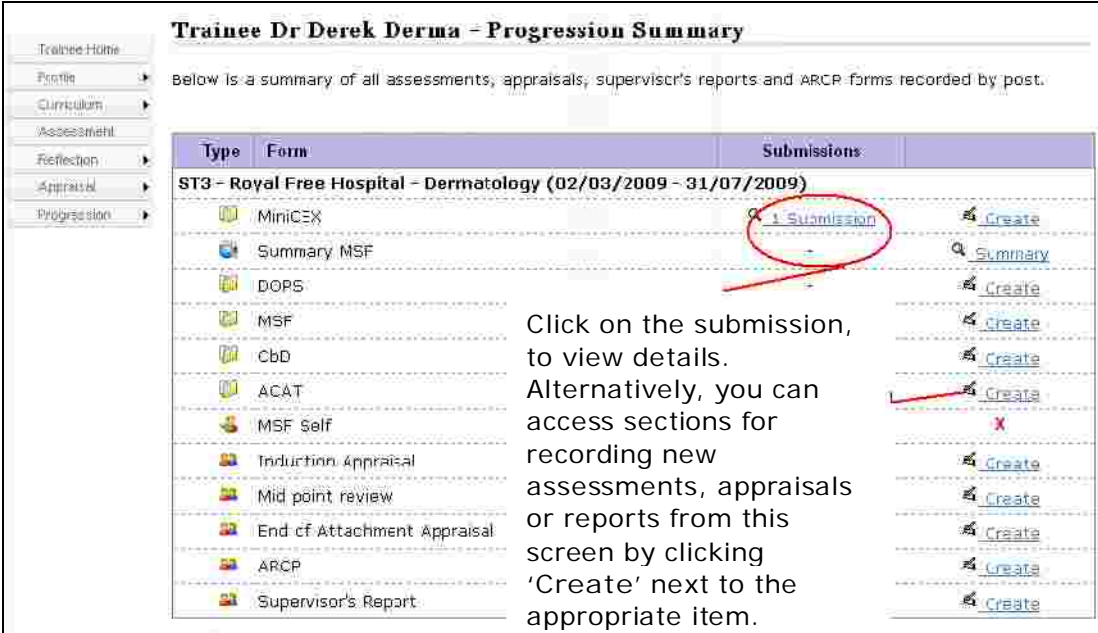6a Dermatological Surgery; Skin surgery

The Supervisor's rating is highlighted at the top.

7. Summary Overview

To get an overview of a trainee's progression, select the trainee from the trainee drop-down menu, then click 'Progression' and then 'Summary Overview.'

You will see a summary of all assessments, appraisals, supervisor's reports and ARCP forms recorded by post for the trainee.

8. Assessments

Workplace-based assessments form an important part of training in medicine. A number of different assessments over a period of time are used to provide information on how a trainee is performing and their degree of clinical competence.

A very important aspect of the assessments is that constructive feedback from the assessor should be provided to shape trainee development.

Trainees are generally responsible for arranging their own assessments (e.g. choosing timing, case and observer).

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

- The trainee records the assessment. This is what JRCPTB expects to be the most common method.
- If you have assessed a trainee to whom you are linked as a supervisor you can record the assessment directly into their ePortfolio.
- An assessor can be given temporary access just to enter an assessment by using the "ticket" process. These assessors do not need to have an ePortfolio username and will not be able to see anything in the trainee's ePortfolio.

To view an assessment, select the trainee from the trainee drop-down menu, and click 'Assessment' in the left links. You will be taken to a table of assessments called 'Work-Based Assessments Summary'.

To view the assessment, click on the appropriate submission link.

To record an assessment for your trainee, access the appropriate trainee's ePortfolio from the Trainee drop-down menu. Then click 'Assessment' on the left.

Then click 'Add New Assessment' to record a new assessment yourself.

Trainee Dr CMT Test – Select Type of Work Based Assessment

Please select the Post that this Work Based Assessment should apply to and then select the "Create" link.

Post: ST1 - Test CMT Hospital (06/10/2008 - 31/12/2008)

	Action
MiniCEX	Create
DOPS	Create
MSF	Create
CbD	Create
ACAT	Create

Work Based Assessment

Select the post that the assessment applies to.

Click 'Create' next to the type of assessment you wish to record.

MiniCEX

Date of Assessment: 11/03/2009

Trainee's Surname: Derma
Trainee's Forename: Deirdre
Trainee's GMC Number:

Assessor's Name: Dr Eddie Supervisor
Assessor's Registration Number (eg GMC, NMC, GDC): 88888888
Assessor Grade: Select

Ensure the correct name and registration number for the assessor is recorded in the boxes below.

Select the grade of the Assessor in the drop-down menu.

Setting for Assessment (eg A&E, GP Surgery):

State the setting for the assessment.

Brief summary of case

Summarise the case in the text box.

Please grade the following areas using the scale below:

Well below expectations for stage of training	Below expectations for stage of training	Borderline for stage of training	Meets expectations for stage of training	Above expectation for stage of training	Well above expectations for stage of training	Unable to Comment*

Medical Interviewing Skills:
○ ○ ○ ○ ○ ○ ○ U/C

Physical Examination Skills:
○ ○ ○ ○ ○ ○ ○ U/C

Record the assessor's rating for the clinical area by selecting the appropriate radio button.

If a clinical area has not been assessed, select 'unable to comment'

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Trainees would normally organise for external assessors to have access to their ePortfolio but there might be circumstances when you wanted to specifically request an assessment for them. The following information about the "ticket" process may be useful should you need to do this.

To make arrangements for an assessment from someone who does not have supervisor access on this account, click 'Request External Assessment'

Then click 'Request New Assessment'

Complete the fields below and then click 'Generate Ticket'.

Trainee Dr Michelle Williams – Generate New Ticket

To request an assessment from a person who does not have supervisor access to this account on ePortfolio, fill out the form below and click "Next". Mandatory fields are marked with a *.

Post *: [ST1 - Royal Bournemouth Hospital (01/09/2008 - 31/08/2009)]

Select the training post.

You can select multiple assessments for one assessor if desired.

Select the form(s) which need completing

Assessment Forms *:
- ☐ MiniCEX
- ☐ DOPS
- ☐ MSF
- ☐ CbD
- ☐ ACAT

Assessor Email:

Assessor Name *:

Assessor Designation / Job Title *:

Assessor GMC / NMC Number:

Assessor Location *:

Comment for assessor:

Add the assessor details and add a message for the assessor if you wish and then 'Generate Ticket'.

[Generate Ticket] [Cancel]

Trainee Dr Michelle Williams – Generate New Ticket

The unique login code for the Assessor to use is: **588q4sw9n3**

A unique login code to allow an entry to be made to the trainee's ePortfolio is emailed to the assessor.

An email has been sent to notifying the assessor of this unique login c

------------------------ Email Sent To Assessor ----------------------

Dear Joe Booth,

Assessments have been requested for the trainee listed below.

Please use the login code "588q4sw9n3" to access these assessments from the ePortfolio home page at https://www.nhseportfolios.org

The following link will automatically enter this code for you:
https://www.nhseportfolios.org/Anon/Login/Login.aspx?LoginCode=588q4sw9n3

ASSESSMENT DETAILS:

Trainee: Dr Michelle Williams
Post: ST1 – Royal Bournemouth Hospital (01/09/2008 – 31/08/2009)
Assessments Requested: MiniCEX
Assessor: Joe Booth
LoginCode: 588q4sw9n3
Trainee Comment:

Thank you for taking the time to complete these assessments.

If you have any problems then please contact support by emailing support@nhseportfolios.org

Regards,
Dr George Harris

Click 'OK'

[Ok]

9. Reflection

Good reflective practice is a core part of any learning programme. If trainees can identify challenges and discuss them with you, it will help them to define future learning opportunities and apply what they are learning in the work environment.

Trainee Dr Michelle Williams - Reflective Practice Logs

Reflective practice material can be recorded in your portfolio and used as example of learning development. You can decide if a reflective record is to remain private or you can share it with supervisors. Be mindful of the need to ensure confidentiality of individuals involved in the experience.

You can use these templates to record a variety learning experiences, using the list of questions to aid your reflective writing.

Shared entries are available for supervisor(s) to review and, if they wish, add comments to. Supervisors are not required to countersign or "approve" reflections.

Title	Type	Date Modified	Date of Activity	Shared?	Countersigned?	Action
🔍 reflection on clinic	Reflection On Clinical Event	25/07/2008 10:29	25/07/2008	✓	✗	Edit Comment/Sign
🔍 Difficult patient with severe bronchitis	Reflection On Clinical Event	09/07/2008 15:01	09/07/2008	✓	✗	Edit Comment/Sign
🔍 Reflection on last post	Reflection On Clinical Event	03/07/2008 16:33	10/06/2008	✓	✓	
🔍 Badly managed case	Reflection On Clinical Event	03/07/2008 14:38	09/06/2008	✓	✗	Edit Comment/Sign

If a trainee has chosen to share a reflection with you, you will be able to view it by clicking the link. You do not need to countersign the entry. This feature will be removed shortly.

10. Appraisal

Trainees can record their own induction and mid-point appraisals. However, they cannot record end of attachment appraisals.

One way of working might be to ask your trainees to save a draft of induction and mid-point appraisals. Then you can check them and save a final version.

To access the appraisal section of a trainee's ePortfolio, select the appropriate trainee from the trainee menu, and then click 'Appraisal' in the left links and 'Appraisal' again.

Appraisal Form	View Submissions
ST1 – Test GMT Hospital - GMT (06/10/2008 - 31/12/2008) 1234567	
Mid point review	✏ 24 October 2008 15:35

To view an appraisal that has been submitted by your trainee, simply click on the submission link in the appraisal table.

Appraisals are recorded as final or draft versions. If you see the small writing icon, it means the submission has been saved as a draft and can be edited.

If you want to save a final version of an appraisal document, ensure the tickbox next to 'Save Form as Draft?' is unchecked.

Sometimes you may record an appraisal yourself.

To record a new appraisal, click 'Add Appraisal'

Select the relevant post from the drop-down menu.

Click 'Create' next to the type of appraisal you wish to record

What still needs to be addressed

Has any assessment or aspect of performance highlighted any concerns which should be addressed within the PDP?

Further explanatory comments:

Complete the relevant fields and then either save the appraisal as a 'draft' or as a final version.

Save Form As Draft?

Save   Cancel

11.   Personal Development Plan

To look at an item from a trainee's personal development plan, select the appropriate trainee's ePortfolio, and then click 'Appraisal' in the left links, and then select 'Personal Development Plan'.

Title	Date Modified	Achieved?	Shared?	Countersigned?	Action
Breaking bad news	24/10/2008 15:01	X	✓	X	Edit Comment/Sign

To view a personal development item, click on the title link.

Please note, you do not need to countersign Personal Development items and this feature will be removed.

12.   Supervisor's Report

The Supervisor's Report has been developed by JRCPTB based on the report proposed in the Gold Guide but adapted to meet the needs of physician's training programmes. It is intended to be a generic report that can apply throughout core training and in all specialties of medicine.

It is designed to allow for it to be used flexibly depending on local arrangements – either to record progress during the course of a single attachment (e.g. a single 4 or 6 month CMT attachment) or a full year (possibly covering 2 or 3 attachments). Trainees can see the reports but cannot add or update them.

A Supervisor's Report can be saved as a draft to be updated or can be saved as a final version. To record a Supervisor's Report, click 'Create' next to the Supervisor's Report item beneath the relevant post in the summary table.

Supervisor's Report

Trainee Name:	Dr CMT Test	
Trainee GMC:	9876542	
Specialty:		

Complete the various fields and radio boxes in the online form.

Completed By:	CMT Supervisor

Period covered by this report

From:

To:

Personal Development Plan

Has the trainee set appropriate objectives in their personal development plan and met these objectives satisfactorily?   ○ No   ○ Yes

Comment on the PDP, particularly if answering No:

Save Form As Draft? ☐

You can save the Supervisor's Report as a draft to come back to later by ticking the checkbox and then clicking 'Save'. Alternatively, you can just click 'Save' to save a final item.

Save   Cancel

TIP!

To help you complete this, it may be useful to refer to more than one screen at once (e.g. the trainee's curriculum/appraisals etc). In Internet Explorer, for instance, you can open a second window by using the shortcut 'Ctl' and 'N' keys.

13. Status Reports

You can run reports on your trainees to monitor their progress.

Summary Report

Using the Summary Report tool, you can get a summary count of the forms completed for your trainees.

Select 'Summary Report' from the Status Reports dropdown menu.

Select which grades and if you want to select a specific location uncheck the box to the left of "All post locations"

You can filter by grade or year and specify whether this should be current posts only.

Then click 'Search Forms' And a summary of completed forms will be displayed.

14. Support

If you have a problem with accessing your ePortfolio or your trainee details are incorrect, your local administrator in your Postgraduate Education Centre should be able to help.

If you need support with another aspect of the ePortfolio, you should click on the 'Support' link and select the category you need help with. If you are not directed to a web page with the support that you require, you will be able to send a message direct to a support administrator.

You should get a response within three working days. If the support team are unable to resolve your query they will let you know that it is being redirected to a technical development team who will get back to you within ten working days.

Support

If you are having any difficulties using the ePortfolio application, we would be happy to assist.

If you want to give us any comments, suggestions, or general feedback, please email ePortfolio using this address: feedback@nhseportfolios.org.

Please select the category that best describes the issue you are facing.

-- Select Category --
- Select Category --
Admin
Assessments/Forms
Curriculum/Competency
General
Login
Profile
Reflection
Supervision
Trainees
None of the above

Select the type of support you require and then click 'Next'.

site map | support

If you cannot resolve your problem from the text provided in the ePortfolio, then send a message to the support team by clicking the contact form button at the bottom.

No, none of these answer my question. | Continue to support contact form >>

Support

Please contact you local administrator if your problem can be resolved directly by them (see notes below)

Please select the type of enquiry that query relates to:

-- Select Type --
- Select Type --
Administration
Page error
Incorrect data
Other

- **Administration:** If you have an issue with your post details, assignment of supervisor, or are experiencing any other problem that requires your local Post Graduate Administrator's intervention, we recommend that you contact your Post Graduate Administrator first as that will be the quickest way to resolve your issue.
- **Page error:** If you are repeatedly experiencing an error page
- **Incorrect data:** If there is some data in your ePortfolio that appears to be wrong, and you, or your local administrator, are unable to fix it.

Select your problem type and then click 'Complete Support Form'

If you think the issue can only be resolved by the ePortfolio support team then please complete the support form:

Complete Support Form

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If you think the issue can only be resolved by the ePortfolio support team then please complete the support form:

Please use the form below to submit a detailed description of the problem you are having.
Fields marked with a * are mandatory.

We will communicate with you on this issue using the email address entered below.

Category: Assessments/Forms

Subject *

Description of issue *

Submitted By

Email Address *   cmt_test@gmail.com

Confirm Email Address * cmt_test@gmail.com

If you want to use a different email address as shown above
please ensure both boxes are completed with the same email address

Submit Support Request

Give as much information as you can about the problem you have. You can change the default email address to another address for the support team to contact you at.

You will receive the following confirmation message.

Support

Your message has been sent to the ePortfolio support team.

All correspondence regarding this enquiry will be sent to **cmt_test@gmail.com**