

## NHS e-Portfolio: A quick guide for Foundation Doctors

### 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. 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/reviewed on e-Portfolio and when.

Your **Educational Supervisor** will have log in access to your e-Portfolio.

Your **Clinical Supervisor** will not have log in access to your e-Portfolio. You will be able to show them necessary details within your e-Portfolio when you sit down for 1:1 meetings through your own log in.

### The Home page

The navigation menu is divided into 6 main sections, **Profile**, **Forms**, **Curriculum**, **Reflection**, **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. Your current post and supervisor details are displayed along with a number of Quick Links providing shortcuts to frequently used sections on e-Portfolio.

### Menu – Profile

- **Personal Details:** Personal details can be entered and amended and a photo can be uploaded. Your password can be changed if needed.
- **Post / Supervisor Details:** Your current post, all posts and supervisors who have access to your e-Portfolio for the training year are displayed.
- **Declarations and Agreements:** To be read and signed by yourself and countersigned by your Educational Supervisor at your first meeting together.
- **Certificates:** Certificates achieved are to be entered here and verified by your Educational Supervisor or PG Centre Foundation Programme staff member either by seeing the paper or uploaded electronic version. To add a new certificate, press the 'Add New Certificate' button. Choose from the drop down list, choosing 'Other' to enter a certificate in free text. Enter the expiration date and press save.
- **Personal Library:** This section can be used to store up to 20MB of documents such as presentations and audits undertaken during your Foundation training. You can choose to share a document or keep it private. New folders can be created to organise your documents.
- **Download Portfolio:** You can select items from your e-Portfolio to be downloaded into a PDF document or download the entire e-Portfolio, especially useful for taking to interviews.
- **Absences:** Your absences during the year should be recorded here. Anything from illnesses to study leave should be recorded.

- **Courses and Seminars:** Displays courses and seminars posted by your Post-graduate centre which may be of relevance to you.

## Menu - Forms

- **Summary Overview:** This contains a summary of all the electronic forms completed for your current and previous posts. Submitted forms can be viewed by clicking on the number of submissions link, and new forms with a create link beside them can be created by clicking on the create link.
- **Work-Based Assessments:** All assessments submitted for your current and previous posts can be viewed here.
- **MiniPAT Summary:** Ensure that your Educational Supervisor releases this to you before your end of placement meeting for discussion of the feedback received.
  - **Request External Assessment button:** Use this button to request that a colleague complete a Mini-PAT assessment on you (nominate at least 12 assessors per each Mini-PAT). Also use this button if your assessor does not have an opportunity to complete the assessment form directly after the assessment occurs (though your log in).
  - Click the 'Request New Assessment' button. Select the post from the drop down box.
  - Select the requested assessment(s) and fill in the nominated assessors details.
  - 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 will need to be printed and handed to the nominated assessor.
  - **Add New Assessment button:** Click this button to generate an assessment form to be completed by your assessor following an assessment.
- **Completing a Mini-PAT when nominated by another Foundation Doctor:**
  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 Mini-PAT to be completed.
  2. Confirm/edit your personal details and confirm the Mini-PAT details.
  3. Complete the Mini-PAT and click the save button. Make sure to click Log Out at the end to ensure the assessment is saved and submitted!!

**Note:** It is a probity issue to complete your own assessments. Random checks do occur.


- **Educational Supervision / Meetings:** This page displays meetings and forms recorded between yourself and your supervisors for your current and previous posts. To add a new meeting form (except Supervisors Report), 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 form.
  - You must document the **Induction Meeting** which is to take place with your Clinical Supervisor at the beginning of each placement using the **Induction Meeting** form.
  - At the end of your placement you must send your Clinical Supervisor a Ticket request to complete the **Supervisors Report** using the Request External Assessment button (see above).

Your supervisor must be present when completing the Induction Meeting form.

- **Target Timeline:** The table gives a timeline of the assessments, self appraisals and meeting forms that must be completed during your current post and records your progress against it. Please see Page 4 of this document for details of the total number of assessments you need to complete to be signed off at the end of the training year.
- **Self Appraisals:** Displays the Self Appraisal forms completed for your current and previous posts. You must complete a Self Appraisal Form at the beginning of each post and a Self appraisal of Learning form at the end of each post. To create a new form, click the 'Add New Self Appraisal Form' button. Choose the current post from the drop down box and click the create link next to the desired form.
- **Tickets:** This page lists all nominated assessor ticket requests that have been made by/for you. A ✓ means the assessment has been submitted a ✗ means it has not. If the request was originally e-mailed and the assessment form has not been submitted by the assessor within 7 days, a 'Send Reminder' link will appear next to the relevant ticket. Clicking on this link will send a reminder e-mail to the assessor.

### Menu - Curriculum

This section outlines the entire Foundation Curriculum and should be used to record competencies you feel you have achieved in different aspects of the Foundation Curriculum. When you click on each competency you can view the details of the competency and add a rating and/or comment on your level of competence within the competency.

- **Linking:** Whenever you see the linking  icon next to an item within your e-Portfolio (assessment, educational log, curriculum competency etc) you can click on it to link it to any other item within your e-Portfolio which you believe it has relevance to. More specifically, you must actively link items within your e-Portfolio to your curriculum competencies, recording evidence of the achievement of curriculum competencies. Comments can also be made against competencies to record evidence of achieving them.

### Menu - Reflection

- **Educational Logs:** Use this section to record any clinical, educational or ethical scenarios and use them to illustrate reflective practice. You can choose whether to keep the entry private or shared with your supervisors. Please be mindful to ensure confidentiality of individuals involved in the experience. It is good practice to link Educational Logs to the curriculum competencies.
- **Personal Development Plan:** Use this section to develop and enter details of your personal development plan (PDP). A new PDP is to be created at the beginning of each of your posts and reviewed with your supervisors.
- **Careers management:** Any careers discussions that occur between you and your supervisors or any other colleagues should be recorded here, this includes plans for F2 tasters and specialty training application discussions.

### 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 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 *Minimum Requirements for Assessments and Assessors of Foundation Doctors* document and the *Overview of Foundation Programme meetings and forms chronologically* table which outlines which meetings and forms on e-Portfolio need to be completed between yourself and your supervisors and when. Sample assessment forms are available here for your reference along with the *Assessment Guide for Foundation Doctors*.
- **Access Rights:** This page outlines the access rights each role of user has to your 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 *Foundation Trainee user guide*.
- **About eportfolio:** This page contains information about e-Portfolio including some definitions.
- **Release Notes:** This page provides direct links to the release notes on e-Portfolio development.

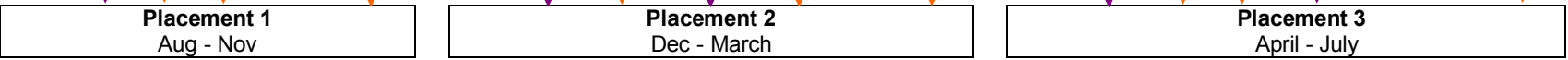
## Target Timeline:

Post 1 1 <sup>st</sup> 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

**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	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													
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			

**FTPD**

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