



Royal College of  
Obstetricians &  
Gynaecologists

RCOG TRAINING EPORTFOLIO HELPSHEETS

# GUIDANCE FOR DEANERY ADMINISTRATORS

JULY 2013

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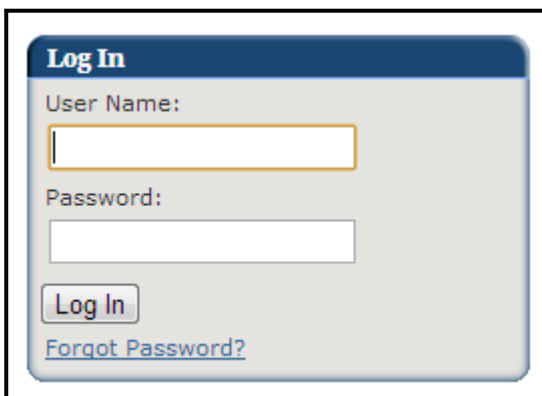
## Accessing the RCOG ePortfolio

The College provides all Deanery Administrators with an ePortfolio account, which enables access to the accounts of all ePortfolio users in the region.

All new Deanery Administrators should automatically receive details from the college regarding ePortfolio access (by email), as your Deanery will have contacted us in order to have an ePortfolio account configured.

The ePortfolio can be accessed at <https://www.nhseportfolios.org>.

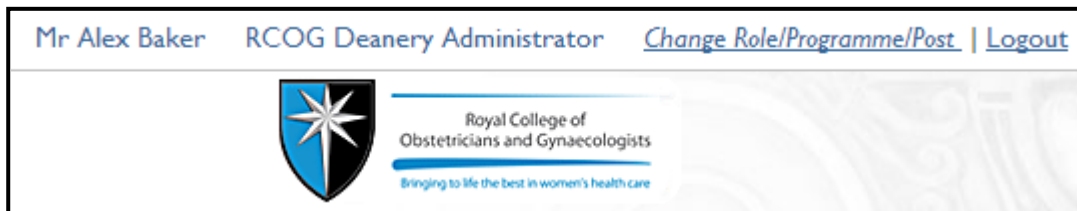
You should enter your ePortfolio Username and Password in the “Log In” box, then click to proceed. If you require a reminder of your details, click the “Forgot Password?” link.



The image shows a screenshot of a web-based login form titled "Log In". The form has a blue header with the text "Log In" in white. Below the header, there are two input fields: "User Name:" and "Password:". The "User Name:" field is a white box with a yellow border. The "Password:" field is a white box with a grey border. Below the input fields, there is a "Log In" button with a grey background and white text. At the bottom of the form, there is a blue link that says "Forgot Password?".

If you have not received your login details for the ePortfolio or have any queries, please contact the ePortfolio Coordinator on telephone number 020 7772 6204 or email [eportfolio@rcog.org.uk](mailto:eportfolio@rcog.org.uk).

If you only have one ePortfolio role, you will be taken straight into your ePortfolio account.



If you possess multiple ePortfolio roles however, you will be presented with the “Select Role” page. Select the option for “RCOG Deanery Administrator”.



You will then be presented with the RCOG Deanery Administrators homepage which will provide you with any relevant and up-to-date RCOG news and information, through the “Alerts” and “Courses & Seminars”.

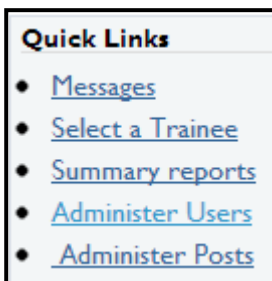
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## Searching for a user








Once you are on the “RCOG Deanery Administrators” homepage, hover over “ePortfolio Admin”, and click “Administer Users”.





Alternatively you can select “Administer Users” through the “Quick Links” block on the right-hand side.




In the next section, enter any relevant details in (e.g. GMC Number, Email) then click “Search users”, to determine whether the user has an RCOG ePortfolio account.

Name: 	<input type="text"/>
GMC:	<input type="text" value="7859405"/>
NTN:	<input type="text"/>
Role:	-- All Roles --
Location:  <small>(All Locations' returns users from other areas)</small>	RCOG  Select a location at or under this..
Post Dates:	<input type="radio"/> From <input type="text"/>  To <input type="text"/> <input checked="" type="radio"/> -- All Years --   <input type="radio"/> Current Posts 
<input type="button" value="Search Users"/>	

If there is no result, please change “Location” from “RCOG” to “-- All Locations --”, and repeat the search, to determine whether the user already has a non-RCOG ePortfolio account (Foundation, External Assessor or other specialty).

Location:  <small>(All Locations' returns users from other areas)</small>	-- All Locations --  RCOG -- All Locations --
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Once you click on name you will be taken to the user's account, and personal information screen.

 <a href="#">Baker, Alex</a>	RCOG Training, Medical Oncology
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## Adding an RCOG role

**N.B.** It is not possible for Deanery Administrators to add an RCOG Trainee role to the ePortfolio, and this right is reserved by the RCOG. It is only possible for deanery administrators to update accounts that have an existing RCOG Trainee role.

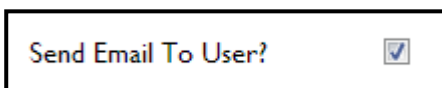
First, perform the user search process, as described in [“Searching for a user”](#).

**If no account exists:**

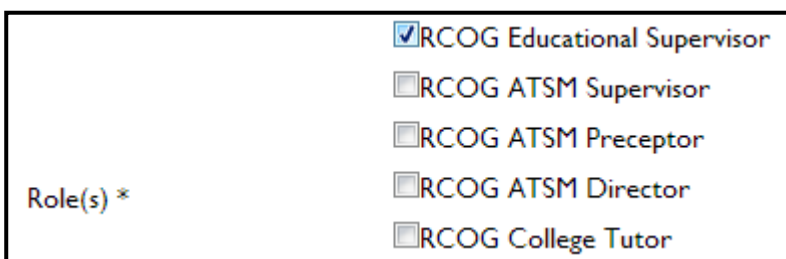
- Click “Create New User”



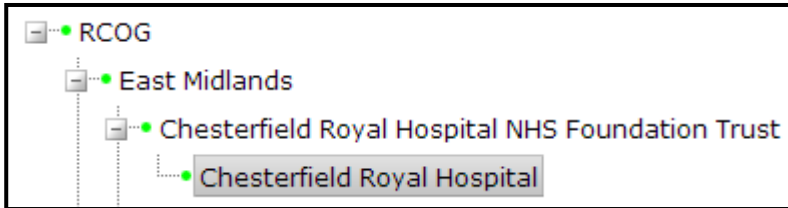
- Enter Trainee’s Title, Forename, Surname, GMC Number and Email Address
- Ensure box entitled “Send Email To User?” is checked



- Select Role (i.e. RCOG Educational Supervisor)



- Select Location to hospital level

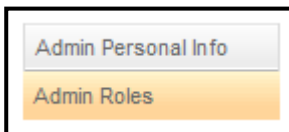


- Click "Create New User"

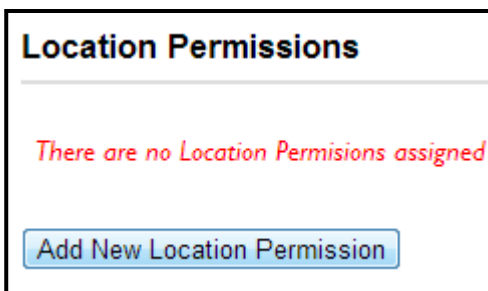
The ePortfolio login details will then be sent to the user, at the email address provided.

**If the user already has a non-RCOG ePortfolio account:**

- Click "Admin Roles", on the left-side panel



- Click "Add New Location Permission"





- Select Role Name (i.e. RCOG Educational Supervisor)

Role Name	RCOG Educational Supervisor
-- Select --	
	RCOG Educational Supervisor
	RCOG ATSM Supervisor
	RCOG ATSM Preceptor
	RCOG ATSM Director
	RCOG College Tutor

- Select Location to hospital level

RCOG Educational Supervisor
RCOG
East Midlands
Chesterfield Royal Hospital NHS Foundation Trust
Chesterfield Royal Hospital

- Click “Add Location Permission”

Add Location Permission	Cancel
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## Adding or Editing a Trainee's Post Details

First, perform the user search process, as described in "[Searching for a user](#)".

Once you have accessed a Trainee's account you will be presented with the Administrator's view, which can be navigated using the menu which appears on the left-hand side.

Admin Personal Info
Admin Programmes
Admin Posts
Admin Photo
Admin Roles
Reset Password
Move Forms
Supervised Trainees

## Adding a Training Programme

Select "Admin Programmes" from the list. You will be taken to "Training Programmes".

### Trainee Mr Alex Baker - Training Programmes

Training Programme	Status	Start Date	End Date	Post(s)	Action		
Medical Oncology	In Progress	01-Aug-2012	06-Aug-2013	0	Edit	Delete	<a href="#">Add/Edit Post(s)</a>
RCOG Training	In Progress	06-Jul-2009	01-Aug-2016	3	<a href="#">Edit</a>	Delete	<a href="#">Add/Edit Post(s)</a>

Enrol in a Training Programme

If there is already an active RCOG Training Programme, skip to [“Adding a Training Post”](#).

If no Training Programme currently exists, click “Enrol in a Training Programme”.

Programme:	<input type="text" value="RCOG - RCOG Training"/>
Training Status:	<input type="text" value="In Progress"/>
Start Date:	<input type="text" value="7/8/2013"/>
End Date:	<input type="text" value="4/8/2020"/>
Full Time Percentage:	<input type="text" value="100"/> %
Code:	<input type="text"/>

- Under **Programme**, select “RCOG – RCOG Training”
- Under **Training Status**, select “In Progress”
- Enter Start and End dates (or select from calendar)
- The “**Full Time Percentage**” and “**Code**” fields can be ignored

**N.B. Please ensure that under “Select Curricula To Add”, all ATSMs (Advanced Training Skills Modules) are deselected. These are highlighted below:**

Abortion Care  
 Acute Gynaecology and Early Pregnancy  
 Advanced Antenatal Practice  
 Advanced laparoscopic surgery for the excision of benign disease  
 Advanced Labour Ward Practice  
 Benign Abdominal Surgery: open and laparoscopic  
 Benign Gynaecological Surgery: Hysteroscopy  
 Colposcopy  
 Fetal Medicine  
 Forensic Gynaecology  
 Oncology  
 Labour Ward Lead  
 Maternal Medicine  
 Medical Education  
 Menopause  
 Paediatric and Adolescent Gynaecology  
 Sexual Health  
 Subfertility and Reproductive Health  
 Vulval Disease  
 Urogynaecology and Vaginal Surgery

Curriculum / Logbook Progress  
 Core Module 1: Clinical Skills

Select Curricula To Add:  Core Module 2: Teaching, Appraisal and Assessment

Finally, click on “Enrol”, and the Training Programme will be created.

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## Adding a Training Post

Select "Admin Posts" from the list. You will then be taken through to the "Training Posts" section.

RCOG Training (06 Jul 2009 to 01 Aug 2016) <a href="#">Edit</a> <a href="#">Delete</a>								
Year	Grade	Location	Specialties	Dates	Code	Supervisors	Duration	Action
6	ST6	WMidlands Test	Obstetrics & Gynaecology	02 Aug 2012 to 01 Aug 2013		Mr Alex Baker (RCOG Educational Supervisor)		<a href="#">Edit</a> <a href="#">Move</a> <a href="#">Delete</a>

Click "Add Post", and you will be taken to the "Add New Posts" section. Follow the steps below to add a new post:

- Enter Grade, Start and End dates (Ignore Reference Code)

Grade:	<input type="text" value="-- Select --"/>
Start Date:	<input type="text" value="25/7/2013"/> <input type="button" value="7"/>
End Date:	<input type="text" value="24/7/2014"/> <input type="button" value="7"/>
Reference Code:	<input type="text"/>

- Select Location to hospital level, then click "Next".

- RCOG
  - East Midlands
    - Chesterfield Royal Hospital NHS Foundation Trust
      - Chesterfield Royal Hospital

- Select specialty as **Obstetrics & Gynaecology**, click >> to add, and then click “Next”.

**Specialties**

- Neurology
- Neuroscience
- Neurosurgery
- Nuclear Medicine
- Occupational Health Medicine
- Old Age Psychiatry
- Oncology
- Ophthalmology
- Oral Surgery

**Added Specialties**

- Obstetrics & Gynaecology

- Click “Search” to find Supervisor, and click >> to add

Name:

Role: RCOG Educational Supervisor

Location: RCOG W Midlands Test

**Supervisors**

- Dr Matthew Prior [Wansbeck General Hospit:
- Mr Test Trainee [RCOG, Guy's and St Thoma

**Added Supervisors**

- Mr Alex Baker [CEM, Foundation, FSRH, RC

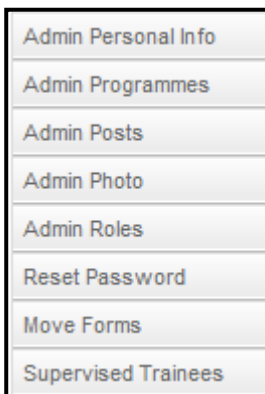
- If supervisor cannot be found, Move Location up to Trust or Deanery, and search again. If there is still no result, consult the [“Adding an RCOG role”](#) section.
- Finally, click on “Finish”, and the Training Post will be created.

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## Changing Profile Details

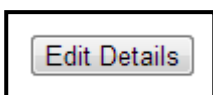
First, perform the user search process, as described in "[Searching for a user](#)".

Once you have accessed a user's account you will be presented with the Administrator's view, which can be navigated using the menu which appears on the left-hand side.



Select "Admin Personal Info" from the list. You will then be taken through to the "Personal Details" section.

Click "Edit Details" at the bottom of the page.



You can then enter all relevant details in the “Personal Details” area.

Personal Details	
Title	<input type="text" value="Mr"/>
Forename *	<input type="text" value="Alex"/>
Surname *	<input type="text" value="Baker"/>
GMC Number:	<input type="text"/>
College Number:	<input type="text"/>
National Training Number:	<input type="text"/>
Department	<input type="text"/>
Email *	<input type="text" value="abaker@rcog.org.uk"/>
Telephone	<input type="text"/>

Click “Save Changes” once you have entered all necessary information.

<input type="button" value="Save Changes"/>
---

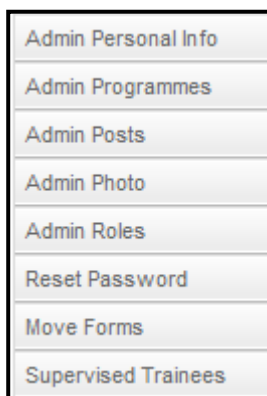
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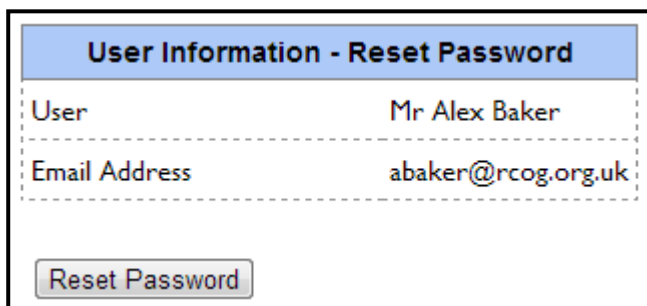
## Resetting Passwords

First, perform the user search process, as described in "[Searching for a user](#)".

Once you have accessed a user's account you will be presented with the Administrator's view, which can be navigated using the menu which appears on the left-hand side.



Select "Reset Password" from the list. You will then be taken through to the "Reset Password" section.



User Information - Reset Password	
User	Mr Alex Baker
Email Address	abaker@rcog.org.uk
<input type="button" value="Reset Password"/>	

Click on "Reset Password". The new password will then be sent to the user, at the email address provided.

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## Moving a Trainee's Assessment Forms to a Different Post

First, perform the user search process, as described in "[Searching for a user](#)".

Once you have accessed a Trainee's account you will be presented with the Administrator's view, which can be navigated using the menu which appears on the left-hand side.

Admin Personal Info
Admin Programmes
Admin Posts
Admin Photo
Admin Roles
Reset Password
Move Forms
Supervised Trainees

Select "Move Forms" from the list. You will then be taken through to the "Move Forms" section.

<input checked="" type="radio"/> From Post to Post	
<input type="radio"/> From Training Period to Training Period	
<b>Step 1: Select Source Post</b> <a href="#">Step 2: Select Forms</a> <a href="#">Step 3: Select Target Post</a> <a href="#">Step 4: Confirm Move</a>	<b>Step 1: Please select a post currently associated with the form:</b> <input type="radio"/> ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013) <input type="radio"/> ST3 - East Midlands test (05 Jul 2010 to 05 Jul 2011) <input type="radio"/> ST2 - East Midlands test (06 Jul 2009 to 04 Jul 2010)
	<input type="button" value="Next"/> <input type="button" value="Cancel"/>

Ensuring that only "From Post to Post" is selected, select the post currently associated with the form(s) then click "Next".

**Step 1: Please select a post currently associated with the form:**

- ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013)
- ST3 - East Midlands test (05 Jul 2010 to 05 Jul 2011)
- ST2 - East Midlands test (06 Jul 2009 to 04 Jul 2010)

On the next screen select the forms you wish to move, and then click "Next"

**Step 2: Please select the forms to move:**

PDP (06 May 2011 13:26) 🔍

On the next screen select the target post that you wish to move the form(s) to, and then click "Next".

**Step 3: Please select a Target post to move the form(s) to:**

- ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013)
- ST3 - East Midlands test (05 Jul 2010 to 05 Jul 2011)
- ST2 - East Midlands test (06 Jul 2009 to 04 Jul 2010)

On the last page check the selection, then click "Finish" to confirm.

**Step 4: Please check the details below and then click on Finish to move the form(s):**

From Post: ST3 - East Midlands test (05 Jul 2010 to 05 Jul 2011)  
To Post: ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013)  
Form(s) To Move: PDP (06 May 2011 13:26) 

Previous

Finish

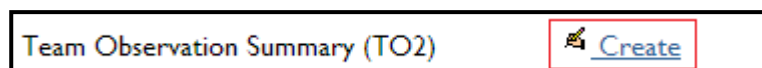
Cancel

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## Generation of the Team Observation 2 Summary (TO2)

The Trainee's Educational Supervisor can create the TO2 form from their account, once all of the TO1 entries have been received. **This may involve adding a supervisor to a Trainee's account, or reminding the Supervisor of their details.** The Trainer should follow the steps below to generate the Trainee's TO2:

1. From the "Educational Supervision / Meetings" page, click "Create" next to the "Team Observation Summary (TO2)" option (this can also be done through "Forms" > "Summary Overview" > "Create" next to the Team Observation Summary (TO2) option).



2. The form you are presented with contains collated data from all the previously unprocessed TO1 forms listed for that post.

A screenshot of a form with the following fields: "Name of Trainee: Mr Alex Baker", "Name of Assessor: Mr Supervisor", "Position: Consultant", "Approval Date: 22/7/2013" (with a calendar icon), and "Number of forms received" (with a text input field containing the number 12). The "Number of forms received" field is highlighted with a red box.

3. If you have paper copies then these can be inputted by overwriting the numbers that are shown for each option.

Empathy and Respect	<input type="text" value="4"/> Unable to comment	<input type="text" value="0"/> Unsatisfactory
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- Comments appear separated by a dotted line. Before you save the TO2 please ensure data is entered from paper TO1 forms, and the comments are ready to be viewed by the Trainee.
- If you wish to release all electronic TO1 form submissions to the Trainee, select the appropriate option. If not, the TO1 form received remains visible but the trainee cannot access the form's content.

Make TO1 content visible to trainee?	<input type="text" value="TO1 content of all forms IS visible to trainee"/>
--------------------------------------	---

- You must select "Release Summary to Trainee" in order for the Trainee to be able to access the TO2 form when they log into their account.

Release Summary To Trainee?	<input type="text" value="Hide Summary From Trainee"/>
-----------------------------	--

- Click "Save" to save the completed TO2 Summary.

When the TO2 form is saved it cannot be edited subsequently, except for the option to make TO1 forms or the TO2 Summary visible to Trainees if they have not originally been released. The same can be said for hiding the TO1 forms after they had previously been released. This permission level can be amended many times.

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