



Royal College of  
Obstetricians &  
Gynaecologists

RCOG TRAINING EPORTFOLIO HELPSHEETS

# GUIDANCE FOR TRAINERS

JULY 2013

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## ePortfolio Access

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- [College Tutors and Training Programme Directors](#)

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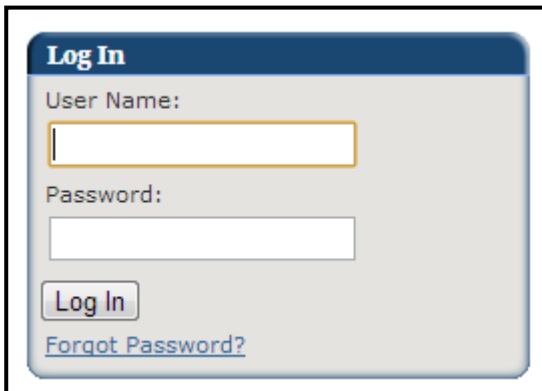
## Accessing the RCOG ePortfolio

The College provides all Educational Supervisors, College Tutors and Training Programme Directors with an ePortfolio, which enables more practical, portable access to Trainee information and training forms.

All new Trainers should automatically receive details from the college regarding ePortfolio access (by email), as your School or 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. At the top, there is a dark blue header with the text "Log In" in white. Below the header, the form has a light gray background. It contains two input fields: "User Name:" followed by a white text box with a yellow border, and "Password:" followed by a white text box with a gray border. Below the password field is a "Log In" button with a gray border and a blue shadow. At the bottom left of the form is a blue hyperlink that says "Forgot Password?".

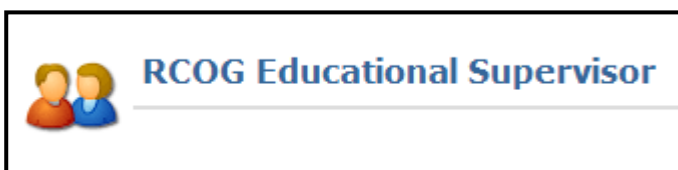
If you have not received your login details for the ePortfolio or have any queries, please contact the ePortfolio Coordinator on telephone number 020 7772 6204 or email [eportfolio@rcog.org.uk](mailto:eportfolio@rcog.org.uk).

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# Accessing your Supervised Trainees

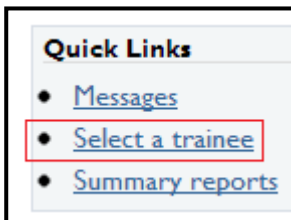
## Educational Supervisors

Once you are logged into your ePortfolio account, you will be presented with the “Select Role” page. Select the option for “RCOG Educational Supervisor”.



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

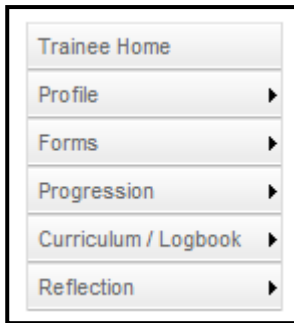
Under “Quick Links”, click the option to “Select a Trainee”.



You will then be presented with a list of the Trainees that you supervise. Click on a Trainee name to access their account.

Trainee Name	
Q Mr Alex Baker	ST4 - WMidlands Test - RCOG - Obstetrics & Gynaecology (02 Aug 2012 to 01 Aug 2013)

You will then be presented with the Trainer view of the Trainee's account, which can be navigated using the menu which appears on the left-hand side.



You can use the links in this menu to access information about your Trainee. The sections are divided as follows:

**Profile** - View information about the Trainee's personal and post details.

**Forms** - View the various electronic Forms that are stored in the Trainee's ePortfolio including Work-Based Assessments, Educational Supervision Forms and Meetings.

**Curriculum / Logbook** - View evidence of the Trainee's progress linked to competences in the Curriculum.

**Reflection** - View the Trainee's reflection on learning opportunities.

Further information on each of these areas can be found in the relevant 2013 Training ePortfolio Helpsheet, accessible through the RCOG website.

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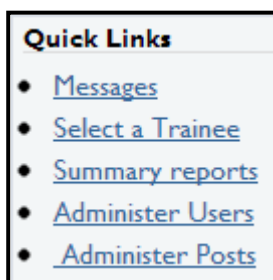
## College Tutors and Training Programme Directors

Once you are logged into your ePortfolio account, you will be presented with the “Select Role” page. Select the option for either “RCOG College Tutor” or “RCOG Training Programme Director” as appropriate.




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

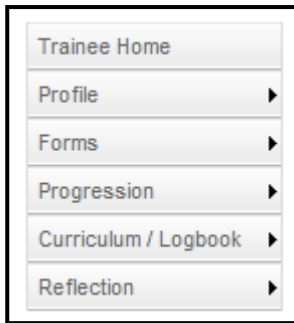
Under “Quick Links”, click the option to “Select a Trainee”.



You will then be presented with a list of the Trainees within your hospital or region. Click on a Trainee name to access their account.

Trainee Name	
 <a href="#">Mr Alex Baker</a>	ST4 - WMidlands Test - RCOG - Obstetrics & Gynaecology (02 Aug 2012 to 01 Aug 2013)

You will then be presented with the Trainer view of the Trainee's account, which can be navigated using the menu which appears on the left-hand side.



You can use the links in this menu to access information about the Trainee. The sections are divided as follows:

**Profile** - View information about the Trainee's personal and post details.

**Forms** - View the various electronic Forms that are stored in the Trainee's ePortfolio including Work-Based Assessments, Educational Supervision Forms and Meetings.

**Curriculum / Logbook** - View evidence of the Trainee's progress linked to competences in the Curriculum.

**Reflection** - View the Trainee's reflection on learning opportunities.

**Progress** - Area for access and completion of the electronic ARCP and Educational Supervisor's Report forms

Further information on each of these areas can be found in the relevant 2013 Training ePortfolio help sheet, accessible through the RCOG website.

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## Support from the College

The College provides dedicated ePortfolio support. If you have any comments or queries relating to the RCOG ePortfolio, please contact the ePortfolio Coordinator on telephone number 020 7772 6204 or email [eportfolio@rcog.org.uk](mailto:eportfolio@rcog.org.uk).

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## Curriculum / Logbook Section

1. [Using the Curriculum / Logbook section of the RCOG ePortfolio](#)
2. [RCOG 2013 Curriculum / Logbook](#)
  - [Logbook Output Report](#)
  - [Trainee Competence Tool – “Single Version of the RCOG Curriculum - Which Changes Affect Me”](#)
  - [Curriculum / Logbook Progress](#)
  - [Curriculum / Logbook Modules](#)
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## Using the Curriculum / Logbook section of the RCOG ePortfolio

Curriculum / Logbook	Logbook Output Report
	RCOG 2013 Curriculum / Logbook
	RCOG 2007
	RCOG ATSM

The RCOG Training ePortfolio includes a multi-functional logbook recording system, which allows Trainees to enter their curriculum competence ratings. It is then possible for Supervisors and Deanery/School educational support staff to see how the Trainee is progressing through the curriculum. The system also allows the Trainee to link work place based assessments, reflective logs and personal library files to specific curriculum competences.

Your Trainee's Curriculum section is easily accessed through the sidebar on the left-hand side of the page, when you are viewing the Trainee's 'Home Page'. The overall progression towards the end of training for each module is recorded under 'Curriculum Progress'.

**Please note that "RCOG ATSM" will only appear if the Trainee has Advanced Training Skills Modules (ATSMs) assigned to their ePortfolio account.**

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# RCOG 2013 Curriculum / Logbook

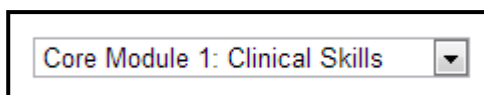
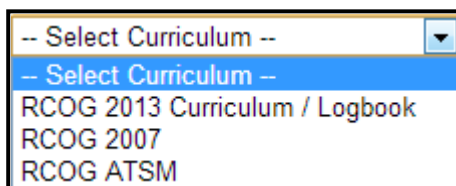
## Logbook Output Report

One of the biggest changes arising from the implementation of the 2013 RCOG Single Curriculum is the scrapping of hard copy logbooks. The RCOG realise that Trainers are very much accustomed to this format, so we have ensured an equivalent will be made available through the ePortfolio.

From the RCOG 2013 Curriculum / Logbook menu Trainers can select “Logbook Output Report”.



You will then be given the option to choose which Trainee Curriculum / Logbook, and then the specific module that you would like to view in the Logbook Output Report.



You will then be presented with the “Logbook Output Report” page for the specific module that you select.

Core Module 6: Postoperative Care	Competence Level					
	Level 1		Level 2		Level 3	
	Date	Signature	Date	Signature	Date	Signature
<b>Conduct appropriate review of:</b>						
Fluid/electrolyte balance		<a href="#">sign</a>		<a href="#">sign</a>		<a href="#">sign</a>
Catheter		<a href="#">sign</a>		<a href="#">sign</a>		<a href="#">sign</a>
Surgical drainage		<a href="#">sign</a>		<a href="#">sign</a>		<a href="#">sign</a>

You can then click on “sign” where appropriate. The rating information entered will appear under the relevant “Level”, to the right of the relevant competence title.

	Level 1	
	Date	Signature
<b>Conduct appropriate review of:</b>		
Fluid/electrolyte balance	22/07/2013	X Mr Alex Baker
Catheter	22/07/2013	X Mr Alex Baker

The information will also appear under the relevant module and competence in the Trainee’s “RCOG 2013 Curriculum / Logbook” section

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## Trainee Competence Tool – “Single Version of the RCOG Curriculum - Which Changes Affect Me”

As part of the implementation of the RCOG 2013 Single Curriculum, the Trainee Competence Tool has been introduced into the ePortfolio. The tool is intended to inform Trainees which competence changes or amendments affect them, based on the specific training year that they will enter in 2013.

### **Single Version of the RCOG Curriculum - Which Changes Affect Me?**

**Please select your current year of training:**

[\[ST1\]](#) [\[ST2\]](#) [\[ST3\]](#) [\[ST4\]](#) [\[ST5\]](#) [\[ST6\]](#) [\[ST7\]](#) [\[SpR\]](#)

Once a training year is selected, the Trainee will be presented with a list of the Core Curriculum Modules. Modules where relevant changes have occurred will be hyperlinked in blue.

### **Which changes affect me? - ST4**

**1. Clinical skills**

**[2. Teaching learning & assessment](#)**

**[3. IT, clinical governance & research](#)**

**[4. Ethical & legal issues](#)**

**5. Core surgical skills**

When the Trainee clicks on a module, the specific changes are shown in a table.

<b>4. Ethical &amp; legal issues</b>		
<b>Competence</b>	<b>Old Level</b>	<b>New Level</b>
FGM competence - Ability to discuss issues surrounding female genital mutilation in a sensitive manner	NEW Competence	Achieve by end of ST5. The competence can be acquired by <a href="#">OM</a>
Participate in critical incident review	Change from attend CNST meeting or equivalent by end of ST5	Level 2/Direct supervision by end of ST5

It is also possible to access information and guidance on sign-off by “OM” (Other Methodologies), by clicking on the hyperlink in the Trainee Competence Tool main menu and the module tables (where applicable).

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## Curriculum / Logbook Progress

From the RCOG 2013 Curriculum / Logbook menu, it is possible to access the Trainee’s ‘Curriculum / Logbook Progress’ area.













RCOG 2013 Curriculum / Logbook    RCOG 2007    RCOG ATSM


[Core Training \(Curriculum / Logbook Progress\)](#)

The curriculum progress section is maintained by the Trainee and will keep Supervisors up to date with ongoing progress.

When accessing each module of the curriculum, Trainees update either module completion or completion of the constituent parts as they progress through basic, intermediate and advanced training. The date of sign off should also be recorded.

Each log enables the Supervisor or Trainee to comment specifically on the completion which will be displayed next to the log as below.

Competences		
 Core Module 1: Clinical Skills  		
 (ES)	Mr Alex Baker	Module completed 11/07/2013 ""
 (T)	Mr Alex Baker	Module completed 06/07/2010 ""
 Core Module 2: Teaching, Appraisal and Assessment  		
 PDP		06/05/2011 
 (ES)	Mr Alex Baker	Module completed 11/07/2013 ""
 (T)	Mr Alex Baker	Advanced competences achieved 06/07/2010 ""

If the curriculum section is kept up to date it will allow both the Trainee and the Educational Supervisor to assess the progress through the curriculum easily, and to see where further experience may be required. These logs in the curriculum can be linked from the Curriculum / Logbook Progress menu screen using this icon  which exists next to each curriculum module in the first screen of the menu.

What would you like to link to this item? :

- [Link With An Assessment](#)
- [Link With A Log](#)
- [Link With A PDP](#)
- [Link With A Self Appraisal](#)
- [Link With A Supervision Form](#)
- [Link With A Post Evaluation Form](#)
- [Link With A Certificate](#)
- [Link With A File In The Personal Library](#)

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## Curriculum / Logbook Modules

From the RCOG 2013 Curriculum / Logbook menu, it is also possible to access the Trainee's curriculum modules.

<a href="#">Core Training (Curriculum / Logbook Progress)</a>	<a href="#">Core Training (Core Module 13: Gynaecological Problems)</a>
<a href="#">Core Training (Core Module 1: Clinical Skills)</a>	<a href="#">Core Training (Core Module 14: Subfertility)</a>
<a href="#">Core Training (Core Module 2: Teaching, Appraisal and Assessment)</a>	<a href="#">Core Training (Core Module 15: Sexual and Reproductive Health)</a>
<a href="#">Core Training (Core Module 3: Information Technology, Clinical Governance and Research)</a>	<a href="#">Core Training (Core Module 16: Early Pregnancy Care)</a>
<a href="#">Core Training (Core Module 4: Ethics and Legal Issues)</a>	<a href="#">Core Training (Core Module 17: Gynaecological Oncology)</a>
<a href="#">Core Training (Core Module 5: Core Surgical Skills)</a>	<a href="#">Core Training (Core Module 18: Urogynaecology and Pelvic Floor Problems)</a>
<a href="#">Core Training (Core Module 6: Postoperative Care)</a>	<a href="#">Core Training (Core Module 19: Developing Professionalism)</a>
<a href="#">Core Training (Core Module 7: Surgical Procedures)</a>	<a href="#">Core Training (Ultrasound Module 1: Basic: Early pregnancy (8-12 weeks))</a>
<a href="#">Core Training (Core Module 8: Antenatal Care)</a>	<a href="#">Core Training (Ultrasound Module 2: Basic: Ultrasound assessment of fetal size, liquor and the placenta)</a>
<a href="#">Core Training (Core Module 9: Maternal Medicine)</a>	<a href="#">Core Training (Ultrasound Module 3: Intermediate: Ultrasound of normal fetal anatomy)</a>
<a href="#">Core Training (Core Module 10: Management of Labour)</a>	<a href="#">Core Training (Ultrasound Module 4: Intermediate: Ultrasound in gynaecology)</a>
<a href="#">Core Training (Core Module 11: Management of Delivery)</a>	<a href="#">Core Training (Ultrasound Module 5: Intermediate: Ultrasound of early pregnancy complications)</a>
<a href="#">Core Training (Core Module 12: Postpartum Problems (The Puerperium))</a>	

Each competence is displayed within the relevant module. Once a module is selected the competences are listed beneath it with any relevant transcribed logs, comments or links previously entered.

Competences			
	<b>Teaching</b>		
	Small group teaching		
	Reflective Practice	14/10/2010	
	(ES) Mr Alex Baker	Level 3 10/07/2013	""
	(ES) Mr Alex Baker	Level 2 10/07/2013	""
	(ES) Mr Alex Baker	Level 1 10/07/2013	""

To add a Trainer’s rating to a log, Trainers select the competence by clicking on it (for example ‘History Taking’, above) and they will then be taken to a screen where they can enter what level has been signed off, when the competence was signed off and any comments.

**Add Rating/Comment**


Rated Date:

Rating:




Comments:

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### “Hourglass” icon

Within the 2013 Curriculum / Logbook section, there is now an "Hourglass" icon to show the Trainee’s 2007 progress 


This icon will appear next to all competences where the Trainee has 2007 Curriculum/Logbook information present. When clicked, it will drop-down to show the details.

 **One-to-one teaching at the bedside**  


---

 (ES) Mr Alex Baker      Level 1 11/07/2013 ""



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 (ES) Mr Alex Baker      Level 3 11/07/2013 ""


---

**RCOG 2007 - Teaching, One-to-one teaching at the bedside** 

---

 PDP      06/05/2011 

---


 (T) Mr Alex Baker      Level 3 / Independent practice 28/10/2010 ""






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## Competence Ticket Requests

It is now possible for Trainees to send Ticket Requests for Curriculum / Logbook competences, to allow completion by an External Assessor.

In the past Trainees would need to enter all of their competence rating information themselves, then have all of this information verified by their assigned Educational Supervisor.

It is also possible for Trainers to generate tickets on behalf of the Trainee, by clicking the “Ticket” icon  to the right of a competence title.

Competences			
[-] Teaching			
Small group teaching 			
Reflective Practice		14/10/2010	
 (ES)	Mr Alex Baker	Level 3 10/07/2013	""
 (ES)	Mr Alex Baker	Level 2 10/07/2013	""
 (ES)	Mr Alex Baker	Level 1 10/07/2013	""





You will then be required to confirm that the competence title is correct, and then enter the assessor’s email address.

Assessor Email:

The ticket method generates an email which is sent to a trainer/assessor with a code to access and complete the competence rating. The assessor will then need to enter the code

under the field labeled 'assessors' on the ePortfolio homepage (<https://www.nhseportfolios.org>).

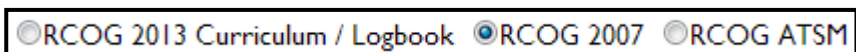
Once completed, the competence rating will appear under the Trainee's 2013 Curriculum / Logbook section

Formal presentation or lecture 			
	(ES) Mr Alex Baker	Level 1	11/07/2013
	(ES) Mr Alex Baker	Level 3	11/07/2013
	(EX) Mr Alex Baker	Level 2	11/07/2013


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## RCOG 2007 Curriculum / Logbook

It is also possible to view all information previously entered on the 2007 RCOG ePortfolio Curriculum / Logbook by the Trainee, by selecting the "RCOG 2007" option from the Curriculum / Logbook menu.



From the RCOG 2007 menu Trainers can select a curriculum module. Each competence is displayed within the relevant module, and once a module is selected the competences are listed beneath it with any relevant transcribed logs, comments or links previously entered.

The "Hourglass" icon is also present  to show where relevant competence information has been entered in the RCOG 2013 Curriculum / Logbook area. When clicked, it will drop-down to show the details.

Competences			
Teaching. Small Group teaching  			
RCOG 2013 Curriculum / Logbook - Small group teaching 			
	Reflective Practice	14/10/2010	
	(ES) Mr Alex Baker	Level 3 10/07/2013	""
	(ES) Mr Alex Baker	Level 2 10/07/2013	""
	(ES) Mr Alex Baker	Level 1 10/07/2013	""

Please note that this area is view only, and that all new competence information should be entered in the RCOG 2013 Curriculum / Logbook area.

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## RCOG ATSM

For all Trainees undertaking Advanced Training Skills Modules (ATSMs), the 'RCOG ATSM' option will appear under the Curriculum / Logbook menu.

<input type="radio"/> RCOG 2013 Curriculum / Logbook <input type="radio"/> RCOG 2007 <input checked="" type="radio"/> RCOG ATSM
---

To sign off ATSM competences for the Trainee:


- Click on the relevant ATSM
- Click on the relevant Competence

You will then be able to sign off the specific competence for the Trainee.

It is also possible to link competences with other areas of the ePortfolio (such as completed forms and personal library items), by clicking on the link icon to the right of the competence title.

What would you like to link to this item? :

- [Link With An Assessment](#)
- [Link With A Log](#)
- [Link With A PDP](#)
- [Link With A Self Appraisal](#)
- [Link With A Supervision Form](#)
- [Link With A Post Evaluation Form](#)
- [Link With A Certificate](#)
- [Link With A File In The Personal Library](#)

It is also now possible to send “Ticket Requests” for the ATSM competences, by clicking the “Ticket” icon  to the right of a competence title. The Ticket Request process is described [here](#).

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## Forms Section

### 1. Summary Overview

### 2. Work – Based Assessments

### 3. ATSMs

### 4. Educational Supervision / Meetings

- Generation of the Team Observation 2 Summary (TO2)
- Induction and Appraisal forms for Educational Supervisors

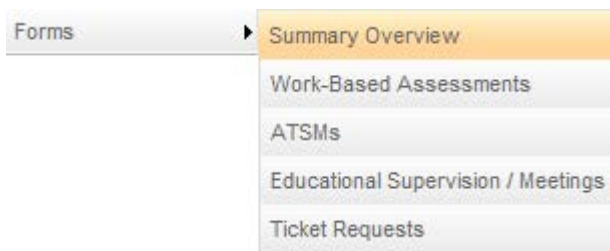
### 5. Ticket Requests

- What is the ticket functionality for external assessments?
- Work – Based Assessment Ticket Requests
- Team Observation Forms

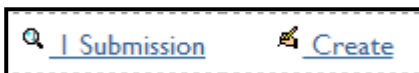
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## Summary Overview

Upon selecting the Summary Overview option from the Forms drop down menu the user is taken to the Forms summary overview which consists of a top down view of submissions.



These range from induction meetings to Work-Based Assessments holistically for the posts actuated on the user's account. The user can create forms from this screen and also see the number of submissions for each form.



If the user clicks on the hyperlinked number of submissions, this link will take them to the relevant area of the Forms section (i.e. Work-Based Assessments or Educational Supervision / Meetings).

This section of the ePortfolio is dedicated to requesting or completing assessments and allows the user, by clicking on the three blue rectangles by the assessment, to link assessments to different areas within the ePortfolio.

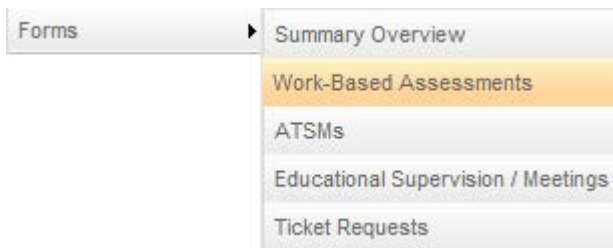
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## Work – Based Assessments


N.B. Any WBA forms that the Trainee creates through their RCOG Trainee login will not be validated assessments. Only assessments carried out through a supervisory login such as a College Tutor or Educational Supervisor, or validated ticket assessor route will be counted as a valid assessment for ARCP purposes. When creating an assessment with Trainee and Trainer present this should always be done through the Trainer’s login.

Trainers can select the “Work-Based Assessments” option, from the “Forms” menu with the Trainee’s account.



You will then be presented with the “Work-Based Assessments Summary” page.

<a href="#">Request External Assessment</a>		<a href="#">Add New Assessment</a>
Assessment Title	View Summary	View Submissions
<b>ST4 - WMidlands Test - RCOG - Obstetrics &amp; Gynaecology (02 Aug 2012 to 01 Aug 2013)</b>		
-----		
OSATS - Ultrasound assessment of pelvic pain		<a href="#">28 June 2013 17:49 (b)</a> 

Details of the Trainee’s completed WBAs are provided (with date, time and Trainer information). The “Links” icon  is also present, which allows you to link the Trainee’s assessments to other relevant areas of their ePortfolio.




What would you like to link to this item? :

- [Link With A Curriculum Item](#)
- [Link With A File In The Personal Library](#)
- [Add A Comment](#)
- [Add A Signature](#)

This page also gives Trainers the following options, on behalf of the Trainee:

**Request External Assessment** – Takes the Trainer to the “Ticket Requests” area for assessments. An explanation is available [here](#).

**Add New Assessment** – Takes the Trainer through to the electronic Work-Based Assessment forms. From this screen, to complete a Workplace Based Assessment simply select the appropriate assessment from the appropriate training year and click on the ‘Create’ option next to it.

File against	ST4 - WMidlands Test (02 Aug 2012 to 01 Aug 2013) ▼
	Action
CbD Gynaecology	 <a href="#">Create</a>
CbD Obstetrics	 <a href="#">Create</a>
MiniCEX Gynaecology	 <a href="#">Create</a>

Once the assessment is completed ensure that the appropriate option is chosen at the bottom of the assessment (i.e. Form completed together or separately at computer during or after assessment).

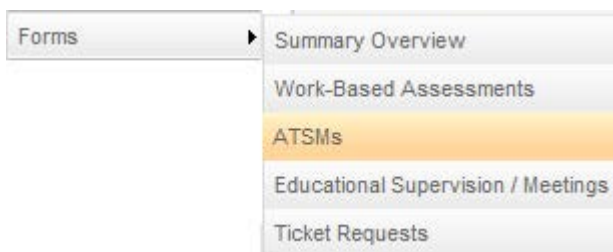
It is possible to submit the assessment by clicking “Save”. The form will then be visible under the Trainee’s “Work-Based Assessments Summary” and “Summary Overview” areas.

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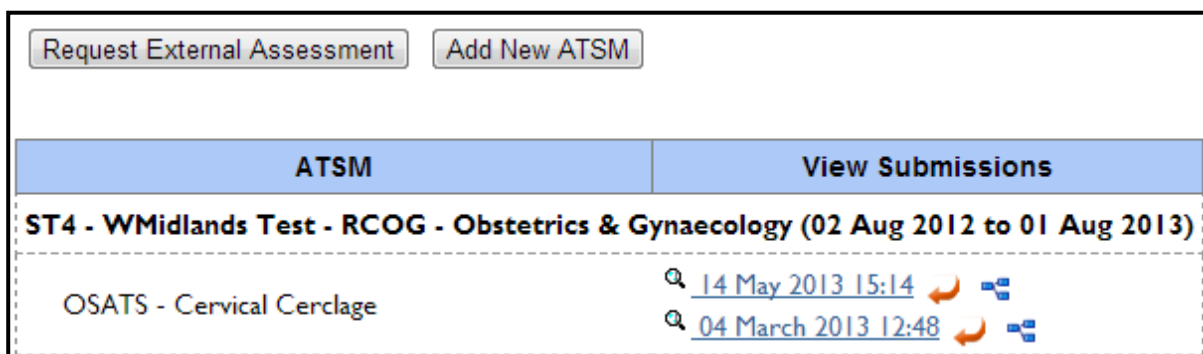
## ATSMs


N.B. Any ATSM forms that the Trainee creates through their RCOG Trainee login will not be validated assessments. Only assessments carried out through a supervisory login such as a College Tutor or Educational Supervisor, or validated ticket assessor route will be counted as a valid assessment for ARCP purposes. When creating an assessment with Trainee and Trainer present this should always be done through the Trainer's login.

Trainers can select the "ATSMs" option, from the "Forms" menu with the Trainee's account.



You will then be presented with the "ATSMs" page.



Details of the Trainee's completed ATSM assessments are provided (with date, time and Trainer information). The "Links" icon  is also present, which allows you to link the Trainee's ATSM assessments to other relevant areas of their ePortfolio.




What would you like to link to this item? :

- [Link With A Curriculum Item](#)
- [Link With A File In The Personal Library](#)
- [Add A Comment](#)
- [Add A Signature](#)

This page also gives Trainers the following options, on behalf of the Trainee:

**Request External Assessment** – Takes the Trainer to the “Ticket Requests” area for assessments. An explanation is available [here](#).

**Add New ATSM** – Takes the Trainer through to the electronic ATSM assessment forms. From this screen, to complete an ATSM form simply select the appropriate assessment from the appropriate training year and click on the ‘Create’ option next to it.

File against	ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013) ▼
	Action
OSATS - Anterior Repair	 <a href="#">Create</a>
OSATS - Cervical Cerclage	 <a href="#">Create</a>
OSATS - Diagnostic Colposcopy	 <a href="#">Create</a>

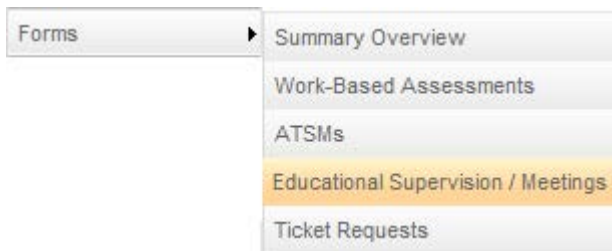
Once the assessment is completed ensure that the appropriate option is chosen at the bottom of the assessment (i.e. Form completed together or separately at computer during or after assessment).

It is possible to submit the assessment by clicking “Save”. The form will then be visible under the Trainee’s “ATSMs” and “Summary Overview” areas.










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## Educational Supervision / Meetings

Trainers can select the “Educational Supervision / Meetings” option, from the “Forms” menu with the Trainee’s account.



You will then be presented with the “Educational Supervision / Meetings” page. Details of the Trainee’s completed Educational Supervision / Meetings forms are provided (with date and time).

Meeting/Form Type	View Submissions
<b>ST4 - WMidlands Test - RCOG - Obstetrics &amp; Gynaecology (02 Aug 2012 to 01 Aug 2013)</b>	
Induction and Appraisal	 <a href="#">28 May 2013 16:08</a>  
Annual Assessment Review Form	 <a href="#">28 May 2013 16:10 (test)</a>  
Training Evaluation Form	 <a href="#">06 June 2012 13:03</a>  

The “Links” icon  is also present, which allows you to link the Trainee’s Educational Supervision / Meetings forms to other relevant areas of their ePortfolio.







This page also gives Trainers the following option, on behalf of the Trainee:

**Add New Meeting or Form** – Takes the Trainer through to the electronic Educational Supervision / Meetings assessment forms. From this screen simply select the appropriate form from the appropriate training year and click on the ‘Create’ option next to it.

File against

ST6 - WMidlands Test (02 Aug 2012 to 01 Aug 2013) ▼

Meeting or Supervision Form

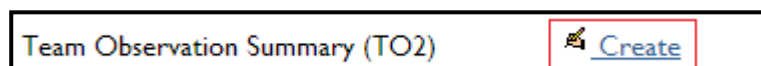
	Action
Team Observation Summary (TO2)	 <a href="#">Create</a>
Induction and Appraisal	 <a href="#">Create</a>
Annual Assessment Review Form	 <a href="#">Create</a>
ARCP Disagreement Form	 <a href="#">Create</a>
Educational Meeting	 <a href="#">Create</a>
Training Evaluation Form	 <a href="#">Create</a>

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

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.

Name of Trainee:	Mr Alex Baker
.....	
Name of Assessor:	Mr Supervisor
Position:	Consultant
Approval Date:	22/7/2013 
.....	
<b>Number of forms received</b>	12

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

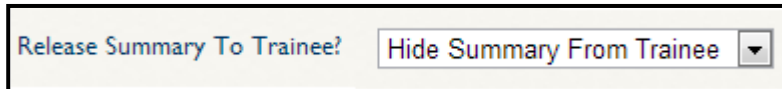
Empathy and Respect	<input type="text" value="4"/> Unable to comment	<input type="text" value="0"/> Unsatisfactory

4. 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.
5. 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"/> 
--------------------------------------	---



6. 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.



The image shows a screenshot of a web form. On the left, there is a label "Release Summary To Trainee?". To its right is a dropdown menu. The dropdown menu is currently open, showing the selected option "Hide Summary From Trainee" and a small downward-pointing arrow on the right side of the menu box.

7. 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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## Induction and Appraisal forms for Educational Supervisors

You may have completed your induction and appraisal form with your Educational Supervisor and should now transfer this to your ePortfolio. If you have completed the form electronically (within the Microsoft Word document), it should not take you very long to copy and paste the data in to the ePortfolio and you will then have all of your data available electronically. If your induction and appraisal document has been written and signed by hand on paper, you will need to re-type the text in to the form, but hang on to the paper version with the signature.

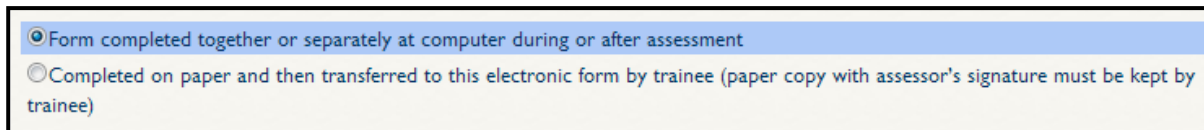
Follow the steps below:

1. When you have accessed the Trainee's account, click the 'Forms' tab and select the "Educational Supervision / Meetings" option.

2. Click “Add New Meeting or Form”. This can be an induction of annual review. Other meetings should be recorded in the reflective area of the ePortfolio as logs of meetings/experiences.
3. Click to create i.e. to load the Induction and Appraisal form, ensuring the correct post details are showing for the Trainee.



4. Complete the form and then at the bottom, tick the box shown and save the form. It cannot be edited afterwards.

A screenshot of a form section. It features two radio button options. The first option is selected, indicated by a blue highlight and a filled radio button. The second option is unselected, with an empty radio button. The text for the first option is "Form completed together or separately at computer during or after assessment". The text for the second option is "Completed on paper and then transferred to this electronic form by trainee (paper copy with assessor's signature must be kept by trainee)".

### **Retaining paper copies of authorised documentation**

Trainees are likely to collect paper certificates and documents throughout training so even though they no longer have a paper based Training Portfolio and file, we recommend that they do keep a file so that they retain this important paperwork.

### **How to upload induction and appraisal draft notes**

Trainees can also scan paper-based documents and upload them to their personal library so that they are easily accessible.

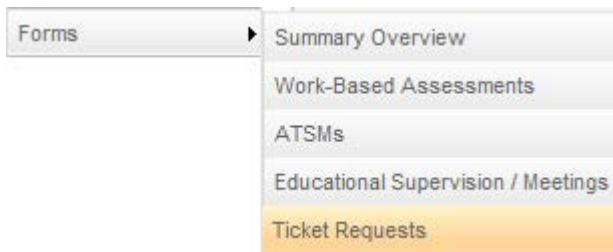
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## Ticket Requests

### What is the ticket functionality for external assessments?

There are a couple of ways to access the screen needed to request an external assessment/Ticket Request.

From the Trainee's "Forms" menu, Trainers can select the "Ticket Requests" option.



Alternatively through "Forms" > "Work-Based Assessments", it is possible to select the "Request New Assessment" option.

[Request New Assessment](#)

By clicking on this option the user is taken to a ticket summary screen, which is automatically calibrated to display the Trainee's outstanding tickets from the last month. This timescale can be altered.

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## Work – Based Assessment Ticket Requests

It is possible for Trainers to send “Ticket Requests” for assessments on behalf of the Trainee, by following the process below:

1. In the Trainee’s account, select “Forms” > “Ticket Requests” > “Generate New Ticket” > select relevant post and OSATS/Mini CEX > click “Next” > enter assessor email and details > select “Send email to assessor” then “Finish” **(NB: If you are completing an assessment for your own supervised Trainee, you should log in to your own account to do this. A ticket is not required)**
2. Ticket and code is visible to Trainer immediately.
3. Ticket code and request for assessment completion is also emailed to the assessor
4. Code is put into eportfolio account by assessor
5. Assessor completes and saves OSATS/Mini CEX online (box at bottom is ticked to say that assessment is completed online)

When the Trainee next logs back in to their account, the assessment is available to view within their ePortfolio. Trainees, Educational Supervisors, Training Programme Directors, College Tutors and Chairs of Deanery STCs or Heads of Schools can access workplace-based assessments for Trainees relevant to them.

In order to have a case-based discussion assessment completed, exactly the same principle applies, but obviously case-based discussions are likely to be pre-arranged so the ePortfolio form completion can be managed accordingly.

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## Team Observation forms

The ticket assessment method can also be used for the completion of Team Observation 1 forms. When assessors have completed a TO1 form, the Trainee can see the number of forms that have been completed, but they cannot access the forms to view the content.

Educational Supervisors, Training Programme Directors and College Tutors can see the content of the TO1 forms, and the Educational Supervisor is responsible for generating a TO2 form for the ARCP or appraisal. TO1 forms can be sent to Trainees but this is at the request of the Trainee and they would need to ask their Educational Supervisor to release the forms.

The TO2 generation process is described [here](#).

Constructive feedback and appropriate support from the Educational Supervisor would be required in this situation, as appropriate.

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