



ROYAL COLLEGE OF
PHYSICIANS OF IRELAND

RCPI ePortfolio 'How To' Guides TRAINEE



Index

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How to access ePortfolio

The RCPI ePortfolio can be accessed via your RCPI Dashboard. To access this page you log in to the RCPI website and select RCPI ePortfolio on the right hand side of your dashboard. This will bring you directly into your ePortfolio.

The screenshot shows the RCPI website dashboard. At the top, there is a navigation bar with the RCPI logo and name, and links for Logout, Contact Us, Feedback, and Help. Below this is a search bar and a welcome message for 'BRIAN COSTELLOE'. A main navigation menu includes links for HOME, FACULTIES & INSTITUTES, POSTGRADUATE TRAINING, COURSES & EVENTS, EXAMINATIONS, PROFESSIONAL COMPETENCE, IMPROVING PATIENT CARE, NEWS & RESOURCES, and ABOUT US. The dashboard content area features several sections: 'Account' (update contact details, view payment history, change password), 'Enrolments' (view current and previous enrolments), and 'Notifications' (pay fees, check messages). A section titled 'Upcoming events, courses & other items you might be interested in' includes filters for 'Of interest to' (Me), 'Related to' (All specialties), 'Type' (All), 'Where' (All), and 'By Month' (All). Below these filters is a table of events:

Date	Details	Action
DEC 16	Trainee Workshop - Health & Meditation: Healing From the Centre Courses Dublin, Ireland	Book Online Closes 15 Dec 2014
JAN 20	Clinical Update: Vaccination Courses RCPI, Ireland	Book Online Closes 20 Jan 2015
JAN 23	Building Resilience In A Challenging Working Environment Courses Dublin, Ireland	Book Online Closes 23 Jan 2015

On the right side of the dashboard, there is a vertical menu of buttons: RCPI ePortfolio (highlighted with a blue circle), @physicians, RCPI Committees, RCPI HST Recruitment, Member Directory, and RCPI Player. Below this menu is a 'My Resources' section with links to 'Courses and events at RCPI 2014/15' and 'St Lukes Symposium brochure 2014'.

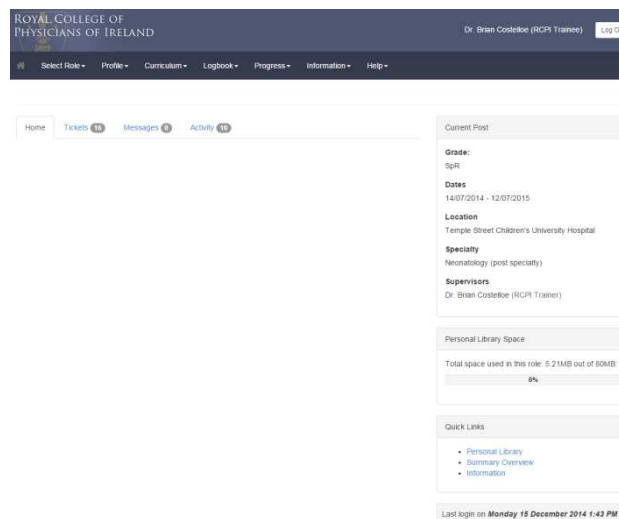
Basic navigation through the RCPI ePortfolio

The following is an overview of the basic navigation through the RCPI ePortfolio. It includes details of what you will find on the homepage of your ePortfolio as well as a closer look at the [ePortfolio menu bar](#).

Details on how to use the specific areas of the ePortfolio are included in the 'How To' guides that follow. You should also consult the Frequently Asked Questions (FAQs) in the Information section of the ePortfolio.

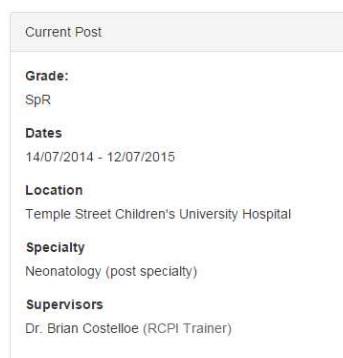
ePortfolio homepage

This is the first page you see when you log in to the ePortfolio as an RCPI Trainee.



Messages: Displays messages sent from RCPI for your information.

Current Post: The current post assigned to you in the system. This information will change automatically as your post changes provided the system has knowledge of future posts.



Quick Links: Displays links to areas of your ePortfolio that you are likely to access regularly.



Quick Links

- [Personal Library](#)
- [Summary Overview](#)
- [Information](#)

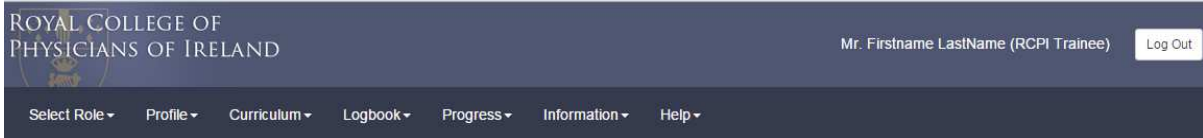
*Note: You can return to this page from anywhere in the system by clicking the **Home** icon found on the top left hand corner of the page, on the menu bar.*



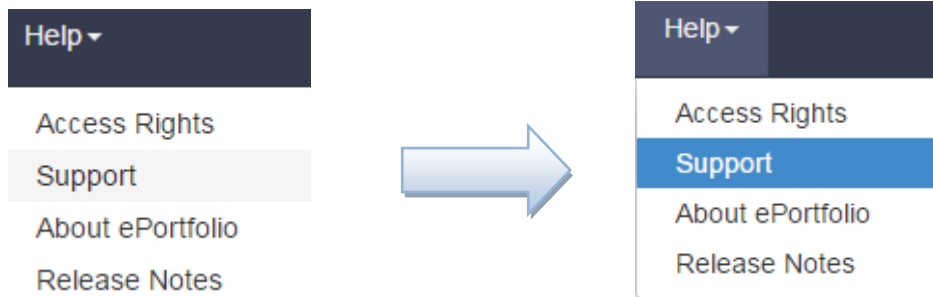


ePortfolio menu bar

The menu is displayed in the blue banner at the top of your screen. You should use this menu to navigate through your ePortfolio.

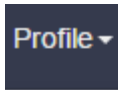


Note: To see what items are contained within a menu, click on the heading and a dropdown of the menu items associated with that heading will appear. Go to an item and click on it to be directed to the relevant page of the ePortfolio.





Profile



Under **Profile**, you can view and make changes to your Profile details.

Personal Details

Post / Trainer Details

Declarations and Agreements

Personal Library

Download Portfolio

Absences

My Filled Forms

Personal Details

View your personal details, including Name, MC Number, RCPI ID and Email address. Upload a profile photo.

Post / Trainer Details

View your current and previous training post details including training year, trainer, as well as the dates and post specialty.

Declarations and Agreements

Click here to view Declarations or Agreements required by your training programme.

Personal Library

Upload supplementary documents to your Personal Library e.g. presentations, certificates, case studies.

Download Portfolio

Download and save a PDF copy of your ePortfolio.

Absences

In lieu of completing the 'Absences' form please contact your RCPI programme coordinator regarding any programme absences.

My Filled Forms

View a list of all forms that you have completed in your ePortfolio.



Curriculum

Curriculum ▾

Under **Curriculum**, you can view the curriculum associated with your training programme and specialty.

BST (BST General Internal Medicine)

Logbook

Logbook ▾

Section 1 - Training Plan

Section 2 - Training Activities

Section 3 - Educational Activities

Section 4 - Assessments

Section 5 - Administrative Forms

Under **Logbook**, you can add and view records for all aspects of your postgraduate medical training, including training, educational and assessment activities. The logbook has five sections, all of which contain forms that are specific to your programme and specialty. You should use these forms to keep a record of all aspects of your training. At the end of your training programme, your logbook should be an accurate record of satisfactory completion of training.

Section 1 – Training Plan

Create and view your Personal Goals Plan here. You should create a new plan at the start of each training post.

Section 2 – Training Activity

Record your training activities here, including clinic attendances, procedures and emergencies.

Section 3 – Educational Activity

Record your educational activities here, including attendances at courses and study days, research and presentation experience.

Section 4 – Assessments

Manage your workplace-based and summative assessments here, such as DOPS, CBDs, MiniCEX, etc.

Section 5 – Administrative Forms

Click here for administrative forms that you might need to submit to RCPI, e.g. Out of Clinical Programme Experience Form (HST)



Progress

Progress ▾

Summary Overview

Progress Report

Review Invitations

Reflective Logs

Under **Progress**, you can view a summary of your logbook entries and send requests to your trainer to review and sign-off your logbook. There is also a dedicated section for reflection on recent events or discussions. It is important to take the time to reflect on, and learn from, difficult or rewarding incidents you encounter as a doctor in training.

Summary Overview

View a summary of all your logbook entries.

Progress Report

Track your progress against the curricular requirements for your programme and specialty.

Review Invitations

Send a request to your trainer to review and sign-off your logbook.

Reflective Logs

Reflect on recent events or discussions that have helped you learn and develop as a doctor.

You can decide if a reflective record is to remain private or be shared with your trainers. Be mindful of the need to ensure confidentiality of individuals involved in the experience.

If you decide to share a reflective record, it will be available for your trainer(s) to review and, if they wish, add comments or signatures of their own.



Information

Information ▾

- How to use the ePortfolio
- Training Information
- Contact Details
- RCPI Home page

Under **Information**, the resources available will guide you on how and when to use your ePortfolio as well as providing useful information relating to your training programme. Administrative forms, Assessment forms and a link back to the RCPI website are also provided.

How to use the ePortfolio

All you need to know about how to use the ePortfolio including 'How To' guides, FAQs and 'When to update the ePortfolio'.

Training Information

Information about training programmes, including BST and HST training agreements, the HST PeTRA Process and Grievance and Disciplinary Procedures.

Contact Details

Contact details for the programme coordinators.

Administrative Forms

A collection of logbook forms that can be printed by a trainee or trainer.

Help

Help ▾

- Access Rights
- Support
- About ePortfolio
- Release Notes

Under the **Help** heading, you can access information about the system itself as well as a Support page that allows you to submit a query to the RCPI Helpdesk.

Access Rights

Review the access that different roles within ePortfolio have with regards to viewing stored information.

Support

Submit enquiries to the RCPI Helpdesk if you are having any trouble using the application or need assistance.

About ePortfolio

Learn about ePortfolio and how it supports the RCPI Programme.

Release Notes

Read about site updates, fixes and deploys.

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How to add a training post

This section does not apply to HST trainees. If you are enrolled in HST and have any queries relating to your training posts please contact Medical Training directly (hst@rcpi.ie).

Trainees in BST will not have access to their logbook until a post is added.

Step 1: On the menu bar, click **Profile**. From the dropdown list that appears, select **Post /Trainer Details**.

Step 2: If you have previously added posts they should appear in a table.

Step 3: To add a new post click 

Step 4: There are three different sections where you need to enter post details: **Details**, **Specialties** and **Trainers**.

Step 1: Details

Step 2: Specialties

Step 3: Trainers

Step 5: Enter the relevant details in step 1 and click **Next**.

Note: Training period year refers to your year of training and should be a number between 1 and 8

Note: Your post number is available from Medical Administration and should be in the format GPT/GIM/SHO/CUH/0702.

Step 6: In Step 2 select a specialty from the list and click the arrow to add the specialty.



Note: This specialty should relate to your post.

Note: Additional specialties can be added as outlined above. Specialties can be removed by selecting the incorrect specialty and clicking the arrows directing to the left.



*Note: If a specialty is not available in the dropdown list it can be entered into the field called **Specialty Other**.*

Step 7: When all specialties have been selected click **Next**.

Step 8: Search for trainers by entering the trainer's surname in the name field. You can broaden the search by changing the location to 'RCPI' at the top of the *Location* drop-down menu; this will search all of the RCPI locations.




Name:

Role:

Location:

RCPI

- AMNCH, Tallaght Hospital (inc. National Chil
- Bantry General Hospital
- Beaumont Hospital

Once you have entered the relevant information, click **Search**. Select the relevant trainer from the results list and click the arrow to add the trainer. 

Note: Trainers can be removed by selecting the incorrect trainer and clicking the arrows directing to the left.

Note: If you can't find your trainer after searching under location 'RCPI', you can contact hospitalinspections@rcpi.ie to register your trainer with RCPI.

Step 9: When you have made the necessary changes click **Finish**.

Your new post should appear at the bottom of the Post / Trainer Details table.

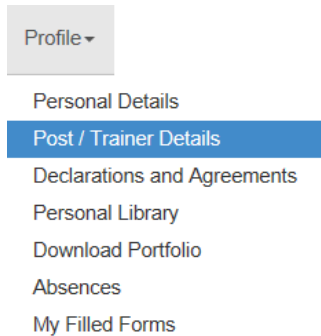
[Back to Index](#)



How to edit my training post

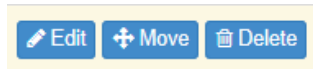
This section does not apply to HST trainees. If you are enrolled in HST and have any queries relating to your training posts please contact Medical Training directly (hst@rcpi.ie).

Step 1: On the menu bar, click **Profile**. From the dropdown list that appears, select **Post / Trainer Details**.



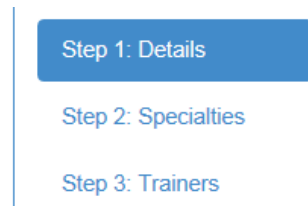
Step 2: Your posts should appear in a table.

Step 3: On the right hand side of the table there are options to **Edit/ Move/ Delete** a post.



Step 4: Click **Edit**.

Step 5: There are three different sections where you can edit Post Details: **Details**, **Specialties** or **Trainers**.




Step 6: Navigate to where the changes need to be made by clicking **Next** or **Previous** in the bottom right-hand corner.



Step 7: (Optional) If required, amend the relevant details in **Step 1** and click **Next**.

Step 8: (Optional) If you are amending details in **Step 2** select a specialty from the list and click the arrow to add this specialty.

Specialties can be removed by selecting the incorrect specialty and clicking the

arrows directing to the left. 



If a specialty is not available in the dropdown list it can be entered into the field called 'Specialty Other' at the bottom of the page.

Step 9: When all specialties have been amended click **Next**.

Step 10: (Optional) To change your trainer in **Step 3** search by entering the trainer's surname in the name field. You can broaden the search by changing the location to 'RCPI' at the top of the *Location* drop-down menu; this will search all of the RCPI locations.

Name:

Role:

Location:

RCPI

- AMNCH, Tallaght Hospital (inc. National Chil
- Bantry General Hospital
- Beaumont Hospital

Select the relevant trainer from the results list and click the arrow to add the trainer.



Existing trainers can be removed by selecting the incorrect trainer and clicking the arrows directing to the left.



Note: If you can't find your trainer after searching under location 'RCPI', you can contact hospitalinspections@rcpi.ie to register your trainer with RCPI.

Step 11: When you have made the necessary changes click **Finish**.

The updated post should appear in the Post / Trainer Details table.

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How to delete a post

This section does not apply to HST trainees. If you are enrolled in HST and have any queries relating to your training posts please contact Medical Training directly (hst@rcpi.ie).

Step 1: On the menu bar, click **Profile**. From the dropdown list that appears select **Post/Trainer Details**.

Step 2: Your posts should appear in a table.

Step 3: Under the Action section of the table there is an option to **Edit/ Move/ Delete** a

post. 

Step 4: Click **Delete**.

Your post has now been deleted and will no longer appear on the Post/Trainer details table.

Note: It is not possible to delete a post with forms associated with it. If you have already created records in your logbook associated with this post you will receive a warning message confirming this. If you still wish to proceed with deleting the post it may be possible to move these forms to another post. Please contact your RCPI programme coordinator if you want to move forms between posts.

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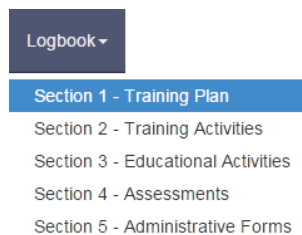


How to create a record in my logbook

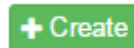
Definition of a record

A logbook contains multiple sections. Each section contains multiple forms. A record is an entry in a form.

Step 1: On the menu bar, click on **Logbook**. From the dropdown list that appears select the relevant section.



Step 2: Click **Create** beside the form to which you wish to add a record.



Step 3: Complete the relevant fields.

Step 4: Click **Save**.

Note: On submission a confirmation message will appear to confirm your record has been successfully created.

Step 5: (Optional) You are then given the option to **Link with a file in the Personal Library** or **Add a Comment**.

Note: Linking to a file in your personal library is a way of providing further evidence for a specific record in your logbook. You have the option to do this each time you make an entry in your logbook.

Note: See [How to link a record with a file in my personal library](#) for further information.

Step 6: To return to your logbook, Click **Continue**.

Note: The number of submissions for that form should have increased by 1.

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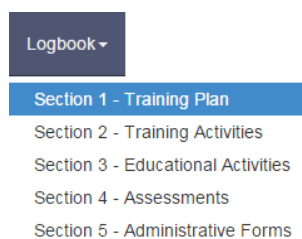
How to edit a record in my logbook

Definition of a record

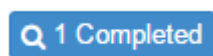
A logbook contains multiple sections. Each section contains multiple forms. A record is an entry in a form.


Note: If a record has been signed off by your trainer, you will no longer be able to edit the record.

Step 1: On the menu bar, click **Logbook**. From the dropdown list that appears select the relevant section.



Step 2: Under the **Submissions** column, click the **Completed** link beside the form record you wish to view.



Step 3: Click on the **Edit symbol**  to the right of the record you wish to edit.

Step 4: Edit the relevant fields you wish to change.

Step 5: Click **Save**.

Note: On submission a confirmation message will appear to confirm your record has been successfully edited.

Step 6: (Optional) You are then given the option to **Link with a file in the Personal Library** or **Add a Comment**.

Note: Linking to a file in your personal library is a way of providing further evidence for a specific record in your logbook. You have the option to do this each time you make an entry in your logbook.

Note: See [How to link a record with a file in my personal library](#) for further information.

Step 7: To return to your logbook, click **Continue**.

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How to complete a standard workplace-based assessment form

Notes on workplace-based assessments (WBAs)

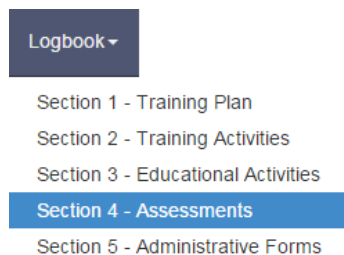
A record of all WBAs should be kept in the ePortfolio. Although the assessment is undertaken by the trainer, the electronic record should be initiated by the trainee and then signed-off by the trainer.

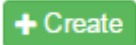
As the actual assessment may take place in a clinical setting without access to a computer, a paper version of the form may be used by the assessor to record the assessment. See [How to print a paper version of a workplace-based assessment](#).

The trainee should retain the paper version of the assessment and use it to update their ePortfolio as per these following steps.

A WBA may also be completed by someone who is not your assigned trainer. Please see [How to send a ticket to an alternative supervisor for a workplace-based assessment](#)

Step 1: On the menu bar, click **Logbook**. From the dropdown list that appears select **Section 4 – Assessments**.



Step 2: Review the list of workplace-based assessments on this page and click **Create** beside the form you wish to complete. 

Step 3: Read the instructions carefully before you begin filling out the form.

Step 4: Select the **Date of assessment** for the date the assessment took place.

Step 5: Under **Location of Assessment**, type in the place where the assessment took place.

Step 6: Fill in the remaining details about the assessment as per the paper record of the event.

Step 7: Complete the rest of the form including ticking the appropriate ratings as per your trainer's assessment of your competence.

Step 8: When you have completed the form, click **Save**.





Step 9: (Optional) You are then given the option to **Link with a file in the Personal Library** or **Add a Comment**.

Note: Linking to a file in your personal library is a way of providing further evidence for a specific record in your logbook. You have the option to do this each time you make an entry in your logbook.

Note: See [How to link a record with a file in my personal library](#) for further information.

Step 12: Click **Continue** to return to **Section 4 – Assessments**.

Continue

Step 13: The number of submissions for that form should have increased by 1.

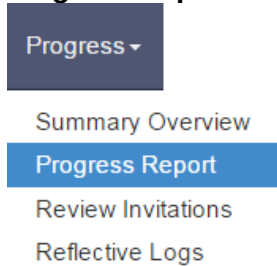
Q 1 Completed

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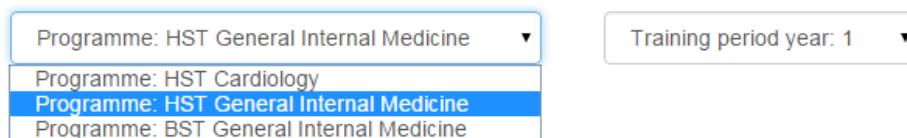


How to view and interpret your Progress Report

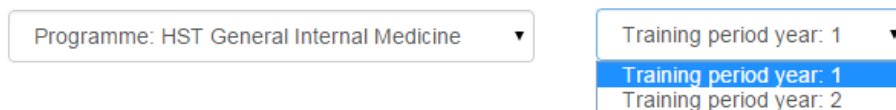
Step 1: On the menu bar, click **Progress**. From the dropdown list that appears select **Progress Report**.



Step 2: To change between your training programmes, click on the drop-down on the left at the top of the page and select a programme.



Step 3: To change between years of training within that programme, click on the drop-down on the right at the top of the page and select a year.



Interpreting your Progress Report

Sections : The Progress Report is divided between Training Post, Training Year and Training Programme requirements

Requirements: Where an item on the progress report is in *italics* it is 'desirable' and is not a mandatory part of the programmes core requirements. For example, *Personal Goals Review* below is in italics in this instance and is therefore not a minimum requirement for this particular programme.

F045 Sample Weekly Timetable	<div style="width: 100%; height: 10px; background-color: blue;"></div>	1 / 1	View Records
F052 Personal Goals Plan	<div style="width: 100%; height: 10px; background-color: blue;"></div>	2 / 1	View Records
F137 <i>Personal Goals Review</i>	<div style="width: 100%; height: 10px; background-color: blue;"></div>	1 / 1	View Records

Progress Bar: The progress bar displays your progress against the curricular requirements for your training programme.

The number of items completed/required is displayed to the right of the Progress Bar. For example, *Personal Goals Plan* above has completed/required at 2/1. This indicates that two *Personal Goals Plan* forms have been completed and one is the minimum requirement.



A blue bar indicates the form has been completed, but not signed. The green bar indicates that the requirement has been completed and signed.

Examples:

Completed minimum requirements and signed:



Completed beyond minimum requirements and signed:



Completed the minimum requirement, but the form has not been signed:



Completed part of the minimum requirement, with no forms signed:



Completed part of the minimum requirements, with two forms signed and two unsigned:



No form has been completed against the requirement:



Alerts: The Alert Icon indicates that the entries against the Progress Report item have not met the minimum requirements for Training Post and Training Year requirements



Note: Where the Alert Icon appears next to non-mandatory items (items in italics) it may be ignored.

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Summary Overview

The Summary Overview provides a summary of all your logbook entries to date.

Request External Assessment: This can be used to request that a consultant or senior registrar who is not your trainer review a completed Work Place Based Assessment. Follow the instructions in the [‘How to send a ticket to an alternative supervisor for a workplace-based assessment’](#) section to request an external assessment.

Posts: The Summary Overview is presented in the order of your posts, beginning with your current/most recent post. The heading for each post contains the following information:


Training Grade: Training Site: Programme: Post Specialty: Trainer: Dates in Post: Post Number

SpR - Temple Street Children's University Hospital - HST General Paediatrics - Neonatology (post specialty) - Dr RCPI Trainer Test (RCPI Trainer) (14 Jul 2014 to 12 Jul 2015) GPT://12345





Note: *BST Trainees can edit their post details by following the instructions in the [How to edit my training post](#) section.*

HST Trainees should contact their specialty coordinator if their post details are not correct.

Sections: Each post is organised in to five sections: *Training Plan, Training Activities, Educational Activities, Assessments* and *Educational Log*. The appropriate forms are displayed under each section.

Submissions: Under the *Submissions* heading, you can view the number of forms you have completed for the relevant post. By clicking on  you can view and edit forms which have not been signed. Details on editing a completed form can be found in the [How to edit a record in my logbook](#) section.

Signatures: Under the *Signatures* heading, you can view the number of each form that has been signed by your trainer.

SpR - Temple Street Children's University Hospital - HST General Paediatrics - Neonatology (post specialty) - Dr RCPI Trainer Test (RCPI Trainer) (14 Jul 2014 to 12 Jul 2015) GPT://12345			
	Submissions	Signatures	Create New
Curriculum Vitae Manager		1	
F052 Personal Goals Plan		1	
F137 Personal Goals Review			
F045 Sample Weekly Timetable		1	

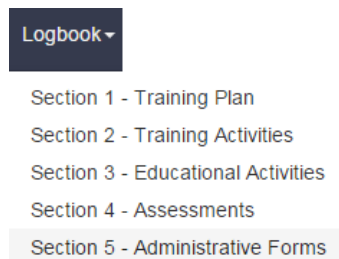
Create: Under the *Create New* heading, click  to create new logbook entries against the corresponding form. See the [How to create a record in my logbook](#) for full instructions on creating new logbook entries.

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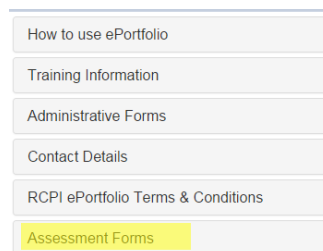
How to print a paper version of a workplace-based assessment form

You may be required to print a paper version of the workplace-based assessment form to facilitate completing it in a clinical setting where you do not have access to the ePortfolio.

Step 1: On the menu bar, click on **Logbook**. From the list that appears click on **Administrative Forms**.

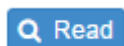


Step 2: On the list of options, click on **Assessment Forms**.



Step 3: Scroll through the information in this section until you find the workplace-based assessment form you are looking for.

Step 4: To open the document, click on the **Read** icon beside the document name.



Note: The form will be available as a PDF so you will require Adobe Reader to access it.

Step 5: To print the form, right click on the mouse and select **Print** from the menu that appears.

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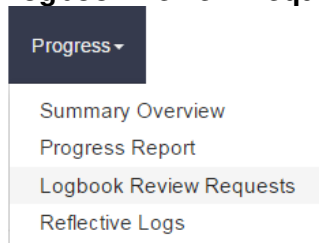
How to send an invitation to my trainer to review and sign-off my logbook

Your trainer should review your logbook and sign-off on your records every quarter. Use the steps in this guide to send an email from your ePortfolio to your trainer inviting them to review your logbook.

Please note that your trainer can review your logbook at any stage but should wait to be prompted by you to sign-off on your records.

For further details please see the 'When to update your ePortfolio' document in the Information section in the ePortfolio.

Step 1: On the menu bar, click **Progress**. From the dropdown list that appears select **Logbook Review Requests**.



Step 2: To send an invitation to your trainer click **Request Review**.

Create new Logbook Review Requests...

Step 3: Select the post you would like reviewed by the given trainer:

1. Select the post / trainer you wish to request reviews for your Logbook:

Select	Post	Specialty	Trainer Name
<input checked="" type="radio"/>	SHO - AMNCH, Tallaght Hospital (inc. National Children's Hospital) (01 Jan 2014 to 07 Jul 2014)	BST Paediatrics	Dr. Firstname LastName

Step 4: Type a personal note to your trainer in the text box provided:

2. Provide a message you wish to accompany your Logbook Review Request (optional):



Dear Dr Firstname LastName
Please review my logbook entries for this post.
Kind regards

Step 5: Click **Send Logbook Review Request**.

Send Logbook Review Request



An email will then be sent to your trainer asking them to log in and review your logbook. Your name will also appear on your trainer's homepage so they can easily access your logbook.

Your request will now appear as **Pending** on your list of logbook review requests. Once your trainer has signed off at least one item in your logbook for this post, the request will change to **Complete**.

You will receive an email once your trainer has signed off at least one item from the requested post. It is possible that your trainer will not sign all the items you have entered and you should review your logbook after your request has changed to **Complete** to check to see if there are any items which remain unsigned.

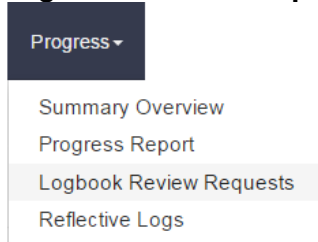
Note: The invitation is a request to review your 'live' ePortfolio; it is not a 'snap-shot' view. It is important to realise that any records you add after the date of invitation and before the date that your trainer reviews your logbook will also be available to your trainer for sign-off.


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How to delete a Logbook Review Request


Step 1: On the menu bar, click **Progress**. From the dropdown list that appears select **Logbook Review Requests**.



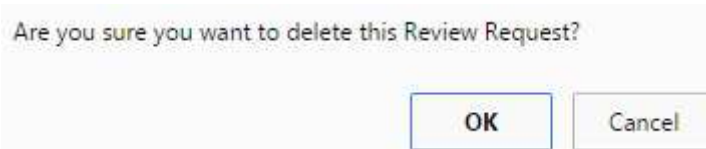
Step 2: Click  next to the desired review request.

Post	Specialty	Trainer Name	Status	
SHO - AMNCH, Tallaght Hospital (inc. National Children's Hospital) (01 Jan 2014 to 07 Jul 2014)	BST Paediatrics	Dr. Firstname LastName	Pending	

Step 3: Click **Delete Logbook Review Requests** to remove your logbook request from your trainer's ePortfolio.

 Delete Logbook Review Request...

Step 4: Click OK to confirm you want to delete your request.

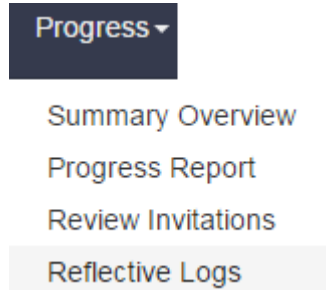


Note: Your request will no longer appear in your trainer's ePortfolio. Your trainer will, however, still be able to sign any entries you have made against this post.



How to create a reflective log

Step 1: On the menu bar, click **Progress**. From the dropdown list that appears select **Reflective Logs**.



Step 2: Click on **Add New Log**.

A green rectangular button with rounded corners containing the text 'Add New Log' in white.

Step 3: Select which post the reflective log relates to by using the dropdown list.

Step 4: From the list of Types of reflective log choose the type of log that you wish to create by clicking **Create**.

A green rectangular button with rounded corners containing a white plus sign followed by the text 'Create' in white.

Note: A pop up message will appear. Please read and click ok.

Step 5: Complete the relevant sections of the form.

Step 6: From the dropdown list at the end of the form select which option you want your reflective log to be filed under **Shared** or **Private** from the dropdown list.

Note: In order for your Supervisor to see an entry it must be shared. If you wish it to be kept private choose Private.

Step 7: Click **Save** if you are finished, or **Cancel** if you do not wish to save it.

Step 8: You will now see that your submission has been completed. You will have an option to link this log to files saved in your personal library.

Note: Please see [How to link a record with a file in my personal library](#)

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How to change my post details to view a previous post

All records you enter into your logbook are automatically recorded against your current post. If you wish to back-fill records for a previous post you must first change your current post to your previous post. The steps in this guide outline how to do this.

Step 1: On the menu bar click on **Logbook** to choose the desired logbook section or **Progress** to view your Progress Report.

<div style="background-color: #333; color: white; padding: 2px; margin-bottom: 5px;">Logbook ▾</div> <ul style="list-style-type: none"> Section 1 - Training Plan <li style="background-color: #eee;">Section 2 - Training Activities Section 3 - Educational Activities Section 4 - Assessments Section 5 - Administrative Forms 	or	<div style="background-color: #333; color: white; padding: 2px; margin-bottom: 5px;">Progress ▾</div> <ul style="list-style-type: none"> Summary Overview <li style="background-color: #eee;">Progress Report Review Invitations Reflective Logs
--	----	--

Step 2: To change between programmes, click on the drop-down on the left at the top of the page and select a programme.

<div style="background-color: #eee; padding: 2px;">HST General Internal Medicine (14 Jul 2014 to 12 Jul 2020) ▾</div> <div style="background-color: #007bff; color: white; padding: 2px;">HST General Internal Medicine (14 Jul 2014 to 12 Jul 2020)</div> <div style="background-color: #eee; padding: 2px;">BST General Internal Medicine (09 Jul 2012 to 13 Jul 2014)</div>	<div style="background-color: #eee; padding: 2px;">Midwestern Regional Hospital (14 Jul 2014 to 12 Jul 2015) ▾</div>
--	--

Step 3: To change between posts, click on the drop-down on the right at the top of the page and select a post.

<div style="background-color: #eee; padding: 2px;">HST General Internal Medicine (14 Jul 2014 to 12 Jul 2020) ▾</div>	<div style="background-color: #eee; padding: 2px;">St. Vincent's University Hospital (14 Oct 2013 to 12 Jan 2014) ▾</div> <div style="background-color: #007bff; color: white; padding: 2px;">Midwestern Regional Hospital (14 Jul 2014 to 12 Jul 2015)</div> <div style="background-color: #007bff; color: white; padding: 2px;">St. Vincent's University Hospital (14 Oct 2013 to 12 Jan 2014)</div>
---	--

Step 4: The information on the **Logbook** or **Progress Report** page will show information relating to the selected post.

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How to change your programme to access a different logbook – dual specialty training programmes

The forms you see in your logbook are determined by your Programme. Logbooks for each programme are stored separately in the system. You can use this process to access a logbook from a previous training programme or, as a dual specialty trainee, to access the logbook for your second specialty.

Step 1: On the menu bar click on **Logbook** to choose the desired logbook section or **Progress** to view your Progress Report.

<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Logbook ▾</div> <ul style="list-style-type: none"> Section 1 - Training Plan <li style="background-color: #e0e0e0;">Section 2 - Training Activities Section 3 - Educational Activities Section 4 - Assessments Section 5 - Administrative Forms 	or	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Progress ▾</div> <ul style="list-style-type: none"> Summary Overview <li style="background-color: #e0e0e0;">Progress Report Review Invitations Reflective Logs
--	----	--

Step 2: To change between programmes, click on the drop-down on the left at the top of the page and select a programme.

BST General Internal Medicine (11 Jul 2011 to 13 Jul 2015) ▾ BST General Internal Medicine (11 Jul 2011 to 13 Jul 2015) HST Geriatric Medicine (07 Jul 2014 to 12 Jul 2015)	AMNCH, Tallaght Hospital (inc. National Children's Hospital) (01 Jan 2014 to 07 Jul 2014) ▾
---	---

Step 3: To change between posts, click on the drop-down on the right at the top of the page and select a post.

BST General Internal Medicine (11 Jul 2011 to 13 Jul 2015) ▾	<div style="border: 1px solid black; padding: 2px;"> Galway University Hospital (08 Jul 2014 to 12 Jul 2015) ▾ Galway University Hospital (08 Jul 2014 to 12 Jul 2015) AMNCH, Tallaght Hospital (inc. National Children's Hospital) (01 Jan 2014 to 07 Jul 2014) </div>
--	---

Step 4: The information on the **Logbook** or **Progress Report** page will show information relating to the selected post.

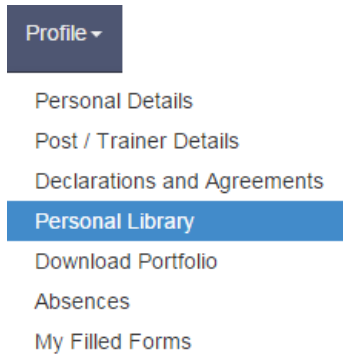
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How to upload a file to my personal library

When uploading files to your personal library it may be useful to create folders to organise these files. You can move files between folders by 'dragging and dropping' them.

Step 1: On the menu bar, click **Profile**. From the dropdown list that appears select **Personal Library**.



Step 2: To create a folder to upload your file to, click on **Create new folder**

Create new folder

Enter the name you want for your new folder.

Folder name:

Click **Save**

Step 3: Click on the blue file icon.



The folder will now appear underneath Library in the left-hand side of the box.

Note: If you wish to create a sub-folder inside your new folder, you can click on the new folder instead of Library.

Step 4: To upload a file directly to the Library, click on the **Upload a file** to your library icon.

Upload a file to your library

Click **Select** and browse to find the file you wish to upload.

File to upload:

Select

File to upload.docx

Step 5: Type a description of the file in the **Description** text box.



Step 6: Click whether the file should be **Shared** or **Private**.

File status Private Shared

Note: In order for your Supervisor to see an entry it must be Shared. If you wish it to be kept private choose Private.

Step 7: Click **Save**.

Save

Step 8: The file should now appear on the left of the box.

Library

Sample New Folder		02/12/2014	02/12/2014	Actions ▾
Sample sub-folder		02/12/2014	02/12/2014	Actions ▾
Sample file upload.docx	9KB	02/12/2014	02/12/2014	Actions ▾

Note: You can go back to view these files at any stage by going directly to your personal library.

*Note: You can also upload a file while you are creating a reflective log or a form in your logbook. After you have completed the form click **File in The Personal Library** after completing a form.*

Add New Link

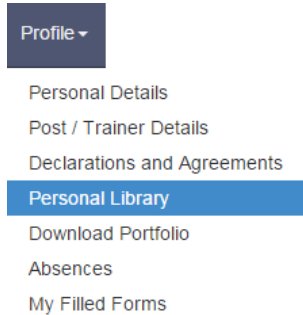
File In The Personal Library

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How to delete documents from my personal library

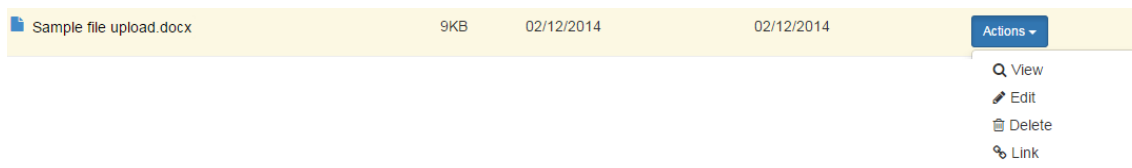
Step 1: On the menu bar, click **Profile**. From the dropdown list that appears select **Personal Library**.



Step 2: Click on the blue folder icon to expand the folders:



Step 3: Click on the file you wish to delete and then the **Actions** menu to the right of the table.



Step 4: Click **Delete**



A pop-up will ask you if you are sure that you want to delete this file. Click OK.

The file has now been deleted from your personal library and should no longer be visible in the Library on the left-hand side of the box.

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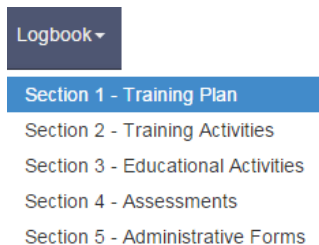
How to link a record with a file in my personal library

Linking with a file in your personal library is a way of providing further evidence for a specific record in your logbook. You have the option to do this each time you make an entry in your logbook or reflective logs. The example used in this guide is linking to a form in your logbook.

You can link with a file at the same time as creating the record OR you can return to link the file at a later date. This guide explains how to link using both of these methods.

It is important to remember that you can only link files that are marked as 'Shared'.

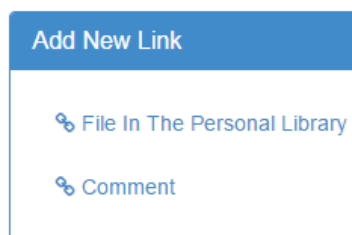
Step 1: On the menu bar, click **Logbook**. From the dropdown list that appears select the relevant section.



Note: You can create a link to any reflective log or form in your logbook (excluding workplace-based assessments).

Step 2: Complete a form in this section using the instructions in [How to create a record in my logbook](#). After you have completed your reflective log or Form a **Links** section will be available.

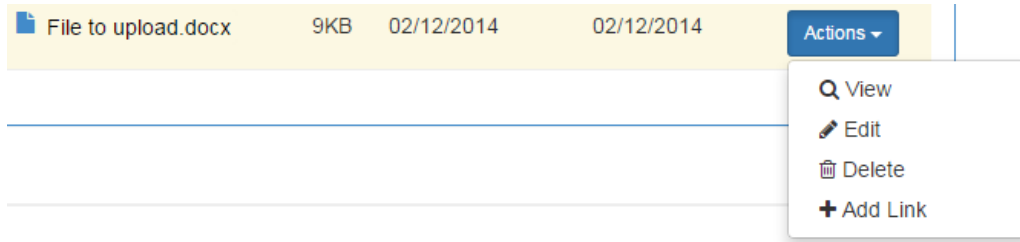
Step 3: Click **File in The Personal Library** link



Step 4: Expand the library and click on the blue folder icon.



Step 5: Click on **Actions** and **+ Add Link**



Step 6: The linked documents will appear in a table at the top of the page. You can view the link you have made by clicking on the spy glass.

Existing Links For: F052 Personal Goals Plan (02/12/2014 14:43:44) [View](#)

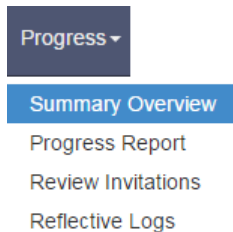
Notes: For details on how to view this link from your logbook at a later date please see Step 11.

Step 7: (Optional) If the file you wish to link is not yet in your personal library you can upload it by clicking **Upload a file to your library**.

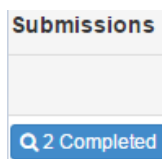
[Upload a file to your library](#)

Note: For instructions on how to upload a file please see [How to upload a file to my personal library](#)

Step 8: (Optional) You can also create a link to a form at a later stage (after it has been created). To navigate to the form click **Progress** on the menu bar. From the dropdown list that appears select **Summary Overview**.



Step 9 Under the **Submissions** column click on the number of forms you have created.



Step 10: From the table that appears click the **edit** symbol to the right of the form that you wish to add a link to.



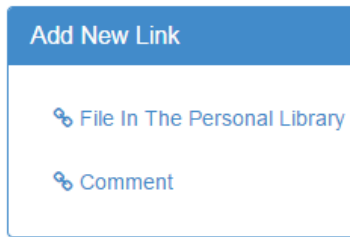
Step 11: At the bottom of the form, click **Links**.



Note: Any links you have previously created will appear here. You can return to view previously linked documents at any stage using this page.



Step 12: You now have the option to add a new link by clicking on **File In The Personal Library**



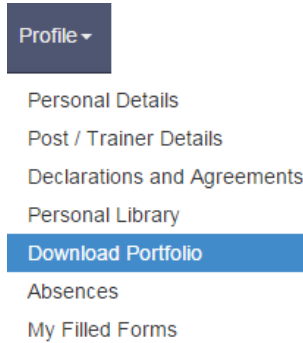
Step 13: From this point refer back to Step 4 of this guide to complete the process.

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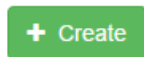


How to download my ePortfolio

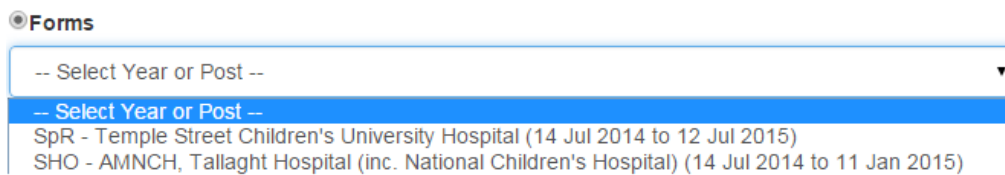
Step 1: On the menu bar, click **Profile**. From the dropdown list that appears select **Download Portfolio**.



Step 2: Click **Create**.



Step 3: From the dropdown list select which year or post you wish to download documents from.



Step 4: From the list of available items in the box below, select which documents you wish to download by clicking on them or by clicking **Select All**.



Step 5: Click the arrow to move them into the box on the right of the page which will contain items to be made into a PDF.



Step 6: Click **Create PDF**.

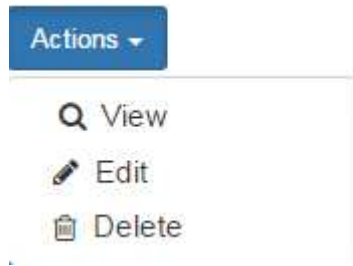


A message will appear in a green progress bar showing the length of time the file will take to convert to PDF.

A pop up message will appear to confirm if the file was successfully converted to PDF.

There is now a screen containing the PDF files available for download.

Step 7: Click Action and then **View** to the right of the file you wish to download.



The file will now open as a PDF.

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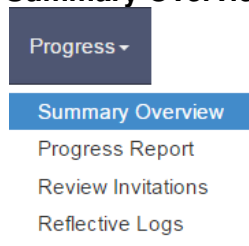
How to send a ticket to an alternative supervisor for a workplace-based assessment

A record of all WBAs should be kept in the ePortfolio. WBAs may be undertaken by a consultant or a senior registrar who is not your assigned trainer. A request to an alternative supervisor is known as a 'ticket'.

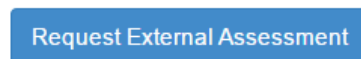
Use the steps in this guide to send a ticket to an alternative supervisor requesting them to complete a workplace-based assessment on your behalf.

Option 1

Step 1: On the menu bar, click **Progress**. From the dropdown list that appears select **Summary Overview**.



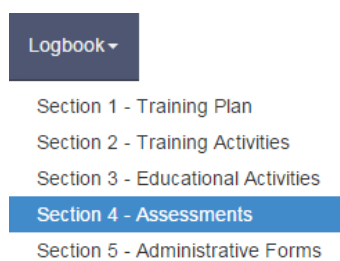
Step 2: To send an invitation to your assessor click **Request External Assessment**.



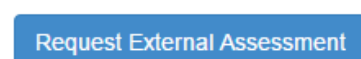
.... see **Step 3** below

Option 2

Step 1: On the menu bar, click **Logbook**. From the dropdown that appears select **Section 4 - Assessments**.



Step 2: Click **Request External Assessment**.



Step 3: Read the instructional text and click **Request New Assessment**.





Step 4: Select your current post from the dropdown list.

Assessment Forms *:

Post *:

Step 5: The list of workplace-based forms in your logbook will appear. Select the form that you wish to send to the assessor by checking the box.

F020 Case Based Discussion

Note: You can select multiple forms for one assessor if you wish.

Step 6: After you have selected the post, click **Next**.

Step 7: Enter the assessor's email address.

Assessor Email:

Step 8: Click **Next**.

Step 9: Complete the mandatory fields required on the form.

*Note: Mandatory fields are marked with a *.*

Step 10: Click **Finish**.



Step 11: An email has now been sent to your assessor with your request.

Create Ticket

An email has been sent to notifying the assessor of this unique login code.
----- Email Sent To Assessor -----

Dear Brian,

Assessments have been requested for the trainee listed below.

Please use the login code "p2samn669p" to access these assessments from the ePortfolio home page at <http://qa.nhseportfolios.org>

The following link will automatically enter this code for you:
<http://qa.nhseportfolios.org/Anon/Login/Login.aspx?LoginCode=p2samn669p>

ASSESSMENT DETAILS:

Trainee: Mr. Firstname LastName
Post: SpR - Temple Street Children's University Hospital (14 Jul 2014 to 12 Jul 2015)
Assessments Requested: F021 DOPS - Clinical, F023 Mini CEX
Assessor: Brian
LoginCode: p2samn669p
Trainee Comment: No
Trainee Email: costelloe9011@test.nhseportfolios.org

Thank you for taking the time to complete these assessments.

If you have any problems then please contact support by emailing ePortfolio Support

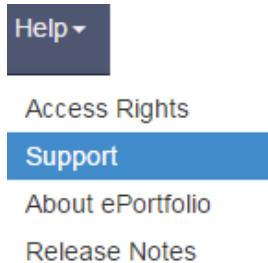
Regards,
Mr. Firstname LastName

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How to log a support query

Step 1: On the menu bar, click **Help**. From the dropdown list that appears select **Support**.



Step 2: Fill in the relevant fields.

The form will pre-populate with your email address. You can change this email address to the email where you want the reply to go.

Step 3: Read the instructions on the page carefully.

Step 4: (Optional) You can attach a supporting document or screenshot by clicking on **Select** in the form and choosing the file you would like to upload



Step 5: Once you have completed the form, click **Submit support request**.

Submit support request

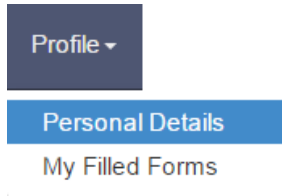
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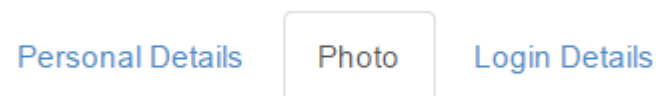
How to upload or change profile photo

Note: When uploading a photo, valid file types are jpg, gif, bmp and png only.

Step 1: Click on **Profile**. From the dropdown list that appears select **Personal Details**.

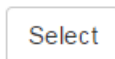


Step 2: Click on the **Photo** tab.



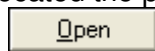
Note: If you have a photo uploaded already, this will be displayed on the left-hand side of the screen.

Step 3: Click **Select** button to browse for a new photo.



Note: Clicking the Select button opens a file browser window that you can use to locate your photo. You will need to have saved the photo you wish to use on your local machine.

Step 4: When you have located the photo you want, click the **Open** button within the file browser window.



Step 5: Click **Upload Photo** link to upload your new photo.



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