Education and Training Department

RCOphth e-Portfolio FAQs for Trainees

1) **User Info**

   Can I rearrange the layout of the front/Home page?
   You can rearrange the Home page by selecting your name from alongside the Logout button. You can then select Dashboard layout and rearrange the titles, although Alerts, Access and Tasks are not movable.

   How do I change my user details – address, email, phone number?
   If you need to make changes to your personal or contact details, please log on to the RCOphth website https://www.rcophth.ac.uk and click on the Members' Area Icon. Alternatively contact the Membership Department at membership@rcophth.ac.uk . For changes to Programme Details please contact portfolio@rcophth.ac.uk .

   How do I move from the trainee role to the CPD role or assessor role?
   You can move between all the roles that you have access to by selecting the 'Switch Role' button in the top right-hand corner next to your name. This will produce a pop-up box and you can select which role you require from the list.

   How I complete my PDP?
   All the fields within the PDP screen must be completed, such as Start Date, End Date and the Objectives. The individual objectives can be completed by selecting the 'Edit' button followed by the Objectives tab and then the 'Mark Complete' button alongside each objective. Please follow through each of the screens and tabs to ensure everything has been completed.

   How do I log my Out of Programme activity?
   All Out of Programme information is submitted to the College to be added to the e-Portfolio once the application has been approved. Any changes to the Out of Programme details should be submitted to portfolio@rcophth.ac.uk with written confirmation of approval for the changes.

2) **Assessments, Assessors and OST**

   How do I change my OST stage in my e-Portfolio?
   If you need to change your OST Stage, please contact portfolio@rcophth.ac.uk and we will discuss what is required and how the stage can be changed.

   Is it possible to complete assessments (e.g. CRS1) on paper rather than online? If I do it on paper, do I need to scan it in and upload it (and to where do I upload it)?
   Use of the e-Portfolio became compulsory for all OST trainees on 1 August 2008. However, it will always be an option to make the initial record on paper and then have the trainee transcribe it to the online system thereafter (preferably very soon thereafter). In that situation the assessor will receive a message asking him/her to log on and validate the transcribed result. The 'traffic-light' grid in the e-Portfolio – which is there to aid you in showing progress towards the stages of OST for ARCPs – does not incorporate scanned WpBA forms or any other evidence.

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I am unable to fill in any assessments online with people who are not listed (only Consultants seem listed) as there seems no way to add another person (e.g. a nurse to assess me on vision, or a more senior trainee to assess slit lamp use)?
College Tutors are responsible for emailing the College on portfolio@rcophth.ac.uk with the names and email addresses of assessors in their unit whom they consider suitable for the task. This includes non-member consultants, whereas consultants who are fellows or members of the College may request to be added to the list directly.

Can I add retrospectively learning outcomes to an approved assessment and, if so, how?
Yes, it is possible. In addition to the primary learning outcome that is selected when adding a new assessment, you will be allowed to associate other learning outcomes (up to 6 in total for OSATS, DOPS and CRS, up to 3 for CBD) plus unlimited associations for Good Medical Practice guidelines and Revalidation domains.
From your Evidence list, select the Requires Action tab for incomplete assessments or the Completed tab for assessments that have already been associated to Learning Outcomes. Select 'Associations' alongside the relevant assessment – this takes you to an expandable and collapsible list of the OST curriculum's learning outcomes. A WpBA form should never be associated to an entire domain. Click the small ▶ sign next to a domain and this will expand the list to show each individual learning outcome, select the appropriate outcome(s) by selecting the outcome. When you are finished, click the associate button at the bottom of the page to save your associations. Once you have selected Save and Complete, you will still be able to edit the learning outcome until the relevant ARCP that the assessment is attached to reaches the Under Review status and locks down all assessments within that ARCP date range.

Where are all my Personal Resources? They are not listed with Shared Resources as before.
Personal Resources has been renamed Additional Evidence and relocated to the Evidence tab. Please select Evidence followed by Additional Evidence and you will see all attachments listed and be able to add further Word documents, Excel spreadsheets and PDFs.

Where can I view the Curriculum requirements for each OST Stage on the Portfolio?
You can view the different OST Stages and 'traffic-light' grid by selecting 'Evidence' from the main tool bar followed by 'Progress per OST stage'. This will take you to the Stages page, where you can see the requirements for each stage, hovering over each item will show what has been added to your portfolio for that requirement. You can also select 'Stage Items' to view the full list of everything added for this stage. The number alongside each of the items indicates how many assessments are required to complete that assessment. Sometimes there will be additional criteria, for example which specific environment or how many assessments have been completed in the past year and in entirety – 'To Date'.

How do I view the specific information for my ARCPs?
Selecting 'ARCP' from the main tool bar takes you to your ARCP list. Only 'Open' ARCPs are editable, once 'Closed', the ARCP cannot be altered in any way. Selecting 'View' allows you to see the specific information for that ARCP, including Evidence added, PDPs, Curriculum Resources and Exam Results. Select 'ARCP Form' alongside the completed/close ARCPs to see what information was entered by the ARCP panel and your resulting outcome.

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My OST level says it is lower than my actual OST level, how can this be corrected?
In most cases the OST level might be incorrect due to an earlier ARCP not being closed or at 'Under Review' status. Once the ARCP has been updated and closed the OST level will automatically update to the next level. Please contact your Deanery to request that they submit legacy ARCP paperwork to the College on portfolio@rcophth.ac.uk . The online ARCP process will only work correctly if all legacy ARCP records are closed – the ARCPs summary page will show which outcome is outstanding. Uploading documents to the Additional Resource tab without informing the College will not suffice as there is no automatic alert mechanism.

What is the process for an assessment once submitted?
Each assessment is added via the Evidence page and, once it is in the system, it appears in the 'Outstanding' tab of the Evidence page. Once you have added the information for the assessment and selected 'Submit' at the bottom of the screen, the assessment moves to the 'Pending' tab and is now awaiting feedback from the relevant assessment. Once the assessor has added their information and confirmed the assessment, it is returned to the trainee and moves to the 'Requires Action' tab. From here, you can now associate to the relevant Learning Outcomes and select 'Save and Complete'. The assessment then moves to the 'Completed' tab.

I am a LAT/LAS/Clinical Fellow/Trust doctor/SAS – can I use the e-Portfolio to record my competencies?
The e-Portfolio is the platform used for the management of progression of learning against the OST curriculum. Its use is mandatory for trainees once appointed to a specialty training post (run-through or LAT).
Non-trainee doctors wishing to be assessed using WpBA forms and have access to the online MSF tool are welcome to register outcomes via the e-Portfolio.
It is important to note that the e-Portfolio in this instance has the sole function of being a personal repository of evidence to manage individual progress and CPD diary, unlinked to the ARCP cycle.
Anyone can use the WpBAs available in the OST curriculum in paper-based form to record competencies gained. If access to the e-Portfolio is made available to you in the future you can upload paper based documents (by scanning them) into the evidence e-Portfolio.
Affiliate registration to the College is necessary to gain access to the e-Portfolio as well as the Eye Logbook. Further information is available on the College website under Affiliate Membership .

3) **Educational Supervisors and MSF**

How can I assign my Educational Supervisor?
To assign your Educational Supervisor you need to go to the 'My Details' page (one of the options on the main tool bar at the top of the screen). Select 'Relationships' from the tabs now on screen to take you into the Relationships page. You should have four drop-down fields each with a different description, Educational Supervisor is the first one. Using the arrow at the end of the box, select your supervisor from the available list, then click 'Update' to complete the action. It is important to remember to assign an Education Supervisor before

sending MSFs for approval. If you are unable to find you Educational Supervisor or have any problems with MSFs please contact the College.

How many responses are required for my MSF?
An MSF requires a minimum of 11 responses to be considered valid. You can select from between 11 and 15 individuals, but 11 responses is always the minimum. It is worthwhile selecting up to the maximum 15 assessors in case one or more of the recipients is unable to reply within the time limit. There is no penalty for having more than 11 responses, so always select as many as available to cover all extenuating circumstances.

When will my MSF close?
The MSF will close once all of the listed assessors have responded and this applies no matter how many assessors there from between 11 to 15. The only other circumstance under which the MSF will close is once 1 month has passed from the date of approval by your Educational Supervisor for the MSF. The date of creation is not applicable, only the date of approval. It is not possible to close an MSF early, even if there are at least 11 responses but still others left to reply and the 1 month has not been reached. The MSF can also not be reopened once it has been closed.

What happens if my MSF closes with less than the minimum 11 responses?
Any MSF that closes with fewer than the minimum 11 responses will be considered invalid and will not associate to the 'traffic-light' grid. You will need to set up and request approval for a new MSF from your Educational Supervisor.

I cannot edit sections of my ESR?
The majority of the information displayed in the Educational Supervisor's Report is drawn from the My Details section of the Portfolio. You must ensure that you have entered all the relevant information in sections such as Placements Details, Timetables, Leave Records, Qualifications, etc.
Some other areas of the ESR are drawn from the Additional Evidence area. There are Information notes added in the ESR indicating how to upload and save the relevant documents so that they are recorded by the ESR.

I have completed my list of assessors and sent the MSF to my ES, why has no received the MSF Request?
Once the MSF list of assessors has been received by the ES, they can either approve or reject the list. If they reject the list, this may be because they feel someone on the list is inappropriate or if you have only selected 11 recipients, you may need to select more up to the maximum 15. If they approve the list, the email requests will be sent out and the 1 month period will begin on the day the MSF is approved.

4) **CPD**

I have no idea how often and what I should record on my CPD diary. It would be very time consuming to have to record my daily activities. Please can you advise on this? I hope it is not necessary to record every clinic and theatre session!

This is up to each individual trainee and we do not wish to be too prescriptive. The CPD function is also now under a separate section. You would still login using the same Membership ID and password, but instead of selecting 'Portfolio Trainee', select 'CPD User' and this will then display the CPD screen and functionality. It would be a good idea to discuss with your local Educational Supervisor what they would like to see recorded.

How do the CPD Cycles work?

CPD Cycles cover a 5-year period working initially from the date that the user first accessed the system. Every 5 years the cycle will lock and only be available as a viewing function. Once the cycle is closed it is not possible to reopen for additional items to be added. If changes are required to the CPD Cycle dates, please contact the College on CPD@rcophth.ac.uk to discuss the requirement.

What is the CPD Certificate?

The CPD Certificate allows you to produce an overview of the most recent CPD cycle to be used for appraisal or revalidation purposes. Once the CPD Certificate has been created, the CPD diary locks from that date of certificate creation going backwards historically. Therefore no additional entries can be added retrospectively to the CPD diary prior to the date of certificate creation. This cannot be reversed and there is also a large red warning message prior to completion of the certificate explaining the process.

CPD Summary Report

The CPD Summary Report produces a downloaded PDF document including all events and reviews within a user's set range of dates. The range of dates can be anything from 1 week to the entire length of time the user has entered information to the CPD diary. There is no restriction on the number of times you can download the report and it does not affect your overall CPD diary in any way.

5) **Other**

How do I access the Eye Logbook from the Portfolio?

Selecting the 'Eye Logbook' from the main tool bar takes you directly to the Eye Logbook login screen. All correspondence concerning using the Eye Logbook and its functionality should be sent via the 'Contact Us' option on the Eye Logbook login screen.