Version 2

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ICM ePortfolio

Guidance for Educational Supervisors

Please note that this is a **live document.** The latest version number is noted above and within. This guidance will be updated over time as the ICM ePortfolio develops, based on feedback from trainers and trainees.

The Faculty of
Intensive Care Medicine

The Royal College of
Anaesthetists

The College of
Emergency Medicine

The Royal College of
Paediatrics & Child Health

The Royal College of
Physicians

RCPE
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Users Guide – Educational Supervisors

Contents

Accessing the portfolio 4

Checking and Amending your Personal Details 4

Using the Messages Function 4

- Message notification 4
- Reading and managing your messages 4
- Adding recipients to a message 4

Viewing outstanding assessment requests 5

Accessing a Trainee’s portfolio 6

Around the time of the first educational supervision meeting… 6

- Signing an educational agreement 6
- Viewing Progress to date 6

To view the posts held (employment history) 6

To view progress with postgraduate examinations 6

- Reviewing a Personal Development Plan 6
- Documenting an educational supervision meeting 7

Creating a form 7

Recording a meeting 7

During the post… 7

- Viewing periods of absence 7
- Viewing a summary of all completed forms 7
- Viewing a summary of completed workplace based assessments 8
- Completing an Educational Supervisor Workplace Based Assessment 8
- Releasing an MSF 8

Viewing MSF respondents 8

Viewing MSF responses 8

Updating an MSF summary once further responses have been received 9

- Marking an Expanded Case Summary 9
- Viewing Professional Activity 9
- Reviewing progress towards curriculum coverage 10

Documenting completion of a competency item *10*
Removing documentation from a competency item *11*
Completing an Educational Supervisors Structured Report 12
    Returning to an ESSR saved as draft 13

Accessing the portfolio

The portfolio can be found at the following address: https://www.nhseportfolios.org

Enter your username and password into the ‘Log in’ box and click ‘Log In’

From the top menu select Select Role > ICM Educational Supervisor

If this role is not present, or you do not have a username and password, please contact the Faculty

The homepage will list all trainees who have allocated you as an educational supervisor. This allocation is done by the trainee and cannot be done as an educational supervisor.

Checking and Amending your Personal Details

On the top menu click Profile > Personal Details

Some of the fields will be pre-populated. If you want to add or change any details click ‘Edit Details’

You can then upload a photo by clicking on the ‘Photo’ tab.

To change your username or password click on the ‘login details’ tab.

Using the Messages Function

Message notification

When you have been sent a message you will receive an email to your registered email address.

Alternatively, your homepage will show the number of unread messages in brackets next to the word ‘messages’ in the ‘Quick Links’ dialogue box.

Reading and managing your messages

From the top menu select Messages

Your messages then appear in an outlook dialogue box (instructions for which are not included within this users guide).

Adding recipients to a message

From the top menu select Messages

Click ‘New’

Click ‘To’

There are three methods of finding message recipients and all can be used for the same message.

Searching for a recipient by location

Select the ‘Users’ tab

Select the location you want to search within (the locations available are limited by your location and access rights)

Click ‘Find Users’

Select the recipients you wish to add (hold Ctrl to select multiple users)

Click ‘Add Recipients’ if you want to add recipients from different locations, and repeat the process as necessary.

Once you have added all recipients click ‘Finished’

Searching for a recipient by role

Select the ‘Groups’ tab

Select the location you want to search within (the locations available are limited by your location and access rights)

Select all roles you want to add e.g. all ICM trainees and all ICM educational Supervisors at Sunderland Royal.

Click ‘Add Recipients’ if you want to add recipients from different locations and repeat the process as necessary.

Once you have added all recipients click ‘Finished’

Searching for a recipient by name

Select the ‘User Search’ tab

Write the name of the person you wish to add and click the magnifying glass icon. The search returns results from all users of all NHS e-portfolio users.

Click ‘Add Recipients’ if you want to find another recipient and repeat the process as necessary.

Once you have added all recipients click ‘Finished’

Viewing outstanding assessment requests

From the homepage click the ‘Ticket’s tab.

Outstanding assessments will be listed. To complete them click the ‘Complete’ button.

Accessing a Trainee's portfolio

From the homepage click the 'View' button that appears next to a trainee's name and current post.

If an expected trainee does not appear, the trainee has not allocated you as an educational supervisor.

Around the time of the first educational supervision meeting…

Signing an educational agreement

A trainee should have a signed educational agreement at the beginning of their training programme – this covers all their supervisors.

From the side menu select Profile > Declarations and Agreements

Next to the educational contract with your name click 'Edit'

Click in the box to sign the form and click 'Save'

Viewing Progress to date

To view the posts held (employment history)

On the side menu click Profile > Posts / Supervisors

To view progress with postgraduate examinations

On the side menu click Profile > Certificates and Exams

The portfolio allows for a supervisor to confirm this information is correct, either by viewing uploaded evidence or by viewing paper records. To confirm an entry as correct, click 'Actions' > Confirm.

Reviewing a Personal Development Plan

Within the portfolio, each PDP is one objective. For example, if a trainee wanted to go on a course to learn chest ultrasound and insert a subclavian line, these would each need to be entered as separate PDPs rather than two items on one PDP.

From the side menu select Curriculum > Personal Development Plan

You can search for PDPs written between a specified date range, and sort either by date modified or alphabetic order (title).

To view an entry click Actions > View

To record an interim assessment of the PDP or document the item as complete Actions > Edit (or click 'Edit' if you are already viewing the item)

Note that once you have signed the PDP item it can no longer be modified, so after making any changes click ‘save’ but do not sign until the item is complete.

If edit does not appear as an option this is because it has been signed already

Documenting an educational supervision meeting

The form for recording an educational supervision meeting can be created either by you or by the trainee.

Creating a form

On the side menu click Progression > Educational Supervisor Meetings

Click ‘Add new meeting or form’

Check that the post you want to file the meeting against is correct.

Click ‘Create’ next to the form required, initial, interim or final.

Recording a meeting

For each meeting, initial, interim or final, selecting the create button will bring up the form for completion. Complete the relevant form in detail.

Then click ‘save’

Only an Educational Supervisor can create these forms

This method will produce separate forms for each meeting. The forms can also be accessed via the Trainee’s summary page, also under the progression tab

During the post…

Viewing periods of absence

All absence from work other than annual leave and study leave should be recorded by the trainee on the e-portfolio.

On the side menu click Profile > Absences

Viewing a summary of all completed forms

From the side menu select Progression > Summary Overview

This page lists all forms that have been completed. For each type of form, a list can be viewed by clicking the ‘submissions’ button.

Viewing a summary of completed workplace based assessments

This view is similar to the Summary Overview, except only WPBAs are listed (educational supervision and ARCP forms are absent)

From the side menu select Assessments > Work Based Assessment

Completing an Educational Supervisor Workplace Based Assessment

The trainee will create the form on their e-portfolio account and you will complete the form with the trainee.

If you want to add a title for the assessment e.g. Percutaneous Tracheostomy write this in the 'code' box. Leave the procedure box blank.

In the 'observed by' box, the names of all your educational supervisors will appear. Delete all but the name of the person completing the assessment.

Complete all the boxes, the trainee will sign the form and click 'Save'

To sign the form you need to log on to your e-portfolio account.

From the side menu select Assessments > Work Based Assessment

Next to each WPBA there will either be a 'view' or an 'edit' button. The edit button signifies that the form is not yet signed by an educational supervisor.

Click 'edit' and sign the form by selecting your name from the dropdown menu and clicking 'save'

Releasing an MSF

The e-portfolio refers to an MSF as a TAB (Team Assessment of Behaviour).

A summary of an MSF can be released to the trainee at any time by their educational supervisor and updated if further responses are received. A minimum of twelve responses are required, so it may be better to wait until twelve responses have been received before releasing.

Viewing MSF respondents

From the side menu select Assessments > MSF

In the table of assessors you will see from the status column whether each assessor has completed the MSF (complete vs. incomplete).

Viewing MSF responses

From the side menu select Assessments > MSF

To view the trainee's self-assessment click 'view' in the self-TAB dialogue box.

To view responses from assessors click ‘Create’ in the TAB-Summary dialogue box.

After reviewing comments you can decide if the MSF has been satisfactorily completed and provide free-text.

The ‘Release Summary To Trainee’ box allows you to select whether to release the summary or hide it from the trainee. The hide option is useful if you have viewed the MSF before it is completed.

Click ‘Save’

Updating an MSF summary once further responses have been received

From the side menu select Assessments > MSF

Click ‘Update’ in the TAB-Summary dialogue box.

Click ‘Refresh Summary Form’

Ensure you are still happy with your free-text comments.

Decide whether to release the summary to the trainee.

Click ‘Save’

Marking an Expanded Case Summary

The method used is the same as a trainee will use if they want to request an assessment from someone other than their educational supervisor.

The trainee will provide you with a copy of their expanded case summary.

You will receive a separate email notifying you that the trainee has requested an assessment.

Click the link in the email and complete the form.

Viewing Professional Activity

The professional activity section is where a trainee can record:

- Attendances at educational events, courses,
- Audits, management and quality improvement projects
- Teaching activity
- Reflection
- Mortality and morbidity activity
- Complaints and complements
- Journal club presentations

As an educational supervisor you should verify and sign the activities.

From the side menu select Profile > Professional Activities

You can search for professional activities between a specified date range, and sort either by date modified or alphabetic order (title).

Click 'Actions' > View to view the details of the professional activity.

To edit the professional activity click 'Actions' > Edit Comment / Sign.

Once you have signed the professional activity it can no longer be modified.

Reviewing progress towards curriculum coverage

From the side menu select Curriculum > The name of the curriculum the trainee is following

Click 'Expand All'

You will then be able to view all of the competencies within the domains and the evidence that has been linked.

A red circle next to an item signifies the items which have not been documented as complete by an educational supervisor.

Documenting completion of a competency item

For each competency item you should assess whether the trainee provided sufficient evidence that a competency has been achieved.

The trainee may have documented their own assessment of competence and some explanatory text.

To view each piece of evidence click 'View'

To view the knowledge and skills for a curriculum item, click on the 'i' icon.

To document achievement of a competency item, click the pencil icon.

The dialogue box that appears allows you to select a level of competence, with the default from the dropdown menu being the level required for that stage of training.

A reminder of the levels of competence are given below:

Level	Task orientated competence	Knowledge orientated competence	Patient management competence
1	Performs task under direct supervision.	Very limited knowledge; requires considerable guidance to solve a problem within the area.	Can take history, examine and arrange investigations for straight forward case (limited differential diagnosis). Can initiate emergency management and continue a management plan,

			recognising acute divergences from the plan. Will need help to deal with these.
2	Performs task in straightforward circumstances, requires help for more difficult situations. Understands indications and complications of task.	Sound basic knowledge; requires some guidance to solve a problem within the area. Will have knowledge of appropriate guidelines and protocols.	Can take history, examine and arrange investigations in a more complicated case. Can initiate emergency management. In a straightforward case, can plan management and manage any divergences in short term. Will need help with more complicated cases.
3	Performs task in most circumstances, will need some guidance in complex situations. Can manage most complications, has a good understanding of contraindications and alternatives.	Advanced knowledge and understanding; only requires occasional advice and assistance to solve a problem. Will be able to assess evidence critically.	Can take history, examine and arrange investigations in a more complex case in a focused manner. Can initiate emergency management. In a most cases, can plan management and manage any divergences. May need specialist help for some cases.
4	Independent (consultant) practice.	Expert level of knowledge.	Specialist.

You can also document a comment if required.

Click ‘Save’ and then click the cross icon in the top right hand corner

The red circle will now have turned green to signify completion of the competency item.

Removing documentation from a competency item

If you have documented competence in error, you will want to return a circle from green to red.

Click the pencil icon.

In the dialogue box that appears click ‘Delete’

Click the cross icon in the top right corner.

Completing an Educational Supervisors Structured Report

An ESSR will generally be completed at the end of every post, although different education providers may have different practices.

The ESSR form must be generated by the educational supervisor.

From the side menu select Progression > Educational Supervisor's Structured Report

Click 'Add Supervisor's Report'

Check that the post you want to file the report against is correct.

Click 'Create'

Complete the boxes on the form

By clicking 'Get posts' the 'posts covered by this report' box will self-populate, as will the numbers of WPBAs that have been completed.

It may be advisable to open the trainee's portfolio on a second computer or explorer tab under their login to refer to when completing this form.

Within the trainee's portfolio, the required information can be found as described in the following table:

For evidence regarding…	**From the side menu select…**
Postgraduate examinations	Profile > Professional Activities
Logbook of activity & procedures	Profile > Personal Library
Educational agreement (educational supervision meetings)	Progression > Educational Supervisor Meetings
Curriculum competencies	Curriculum > The curriculum the trainee is following
Workplace based assessments (numbers will have self-populated)	Assessments > Work Based Assessments
MSF	Assessments > MSF
Complaints & complements	Profile > Professional Activities
Expanded case summaries	

Audit / Quality improvement project	
Morbidity and mortality meetings	
Journal club presentations	
Teaching	
Research	
Educational events	
Management and leadership skills development	
Critical incidents	
Reflection	

You will then be asked to comment on concerns / investigations and probity / health.

A global rating of the trainee's performance is then required, with guidance within the form itself to help benchmarking.

If you want to edit the form at a later date, select the 'save as draft' box. A draft form will not be released to the trainee.

Click 'Save'

Returning to an ESSR saved as draft

From the side menu select Progression > Educational Supervisor's Structured Report

Click 'Edit'

Add further entries to the form.

Either save again as draft, or if complete save without the 'save as draft box' being checked.