The Royal College of Anaesthetists

The College of Emergency Medicine

The Royal College of Paediatrics & Child Health

The Royal College of Physicians

RCPE
The Royal College of Physicians of Edinburgh

The Royal College of Physicians and Surgeons of Glasgow

The Royal College of Surgeons of Edinburgh

The Royal College of Surgeons of England

Version 1.1

October 2015

ICM ePortfolio

Guidance for Regional Advisors Users

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

Users Guide – Regional Advisors and Training Programme Directors

Contents

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 Regional Advisor

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 located in your region. This allocation is done by the Faculty and cannot be done as an Regional Advisor.

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'

Creating Reports

The portfolio will allow you to generate three types of reports:

Report type	Data available	Sample	Example
Summary	Type of form	LETB or Hospital	Number of WPBA or ARCP forms completed by each of the stage 1 trainees at Sunderland Royal between 1st Jan and 6th Feb
Assessment	Number and type of workplace based assessments	LETB or Hospital	Number of DOPs completed by each of the stage 1 trainees at Sunderland Royal between 1st Jan and 6th Feb
Form Count	Type of form	LETB or Hospital	Number of DOPs completed in Sunderland Royal between 1st Jan and 6th Feb

Creating a Summary Report

From the top menu select Status Reports > Summary Report

Specify the date range

There are two ways to determine the date range for your enquiry; either by the date the form was completed or the post during which the form was completed.

The searches can interact in an unpredictable way however, so the following method is recommended:

Specify the post dates first. You can either specify posts within a date range, an academic year (Aug 1st to July 31st), or specify current forms only.

If you want to reduce the search further, insert a date range into the 'Forms submitted From:' boxes at the top of the page. Otherwise leave them blank.

e.g. 1 To search between 1st and 30th April 2014:

Select 2013-2014 from the 'post dates' options

In the 'Forms submitted From' boxes insert the date range 1/4/2014 to 30/4/2014 e.g. 2 To search for all forms completed by trainees in their current posts:

Select 'Current Posts' from the 'post dates' options

Leave the 'Forms submitted From' boxes blank

Specify the data

Select the forms to want to report in the top dialogue box (up to seven can be selected).

Specify the sample

Specify whether you want to search for trainees at a certain stage of training (1-3) by selecting the required group from the 'Grade' drop-down menu.

Specify the locations to want to search using the 'Location' drop down menu. You can search at the level of a LETB, trust or hospital.

Click 'Search Forms'

To view the dates the forms were completed and the specific type of form click the magnifying glass icon to the right of the table.

To view a trainee's portfolio click the magnifying glass icon to the left of the table.

Creating an Assessment Report

Specify the date range

There are two ways to determine the date range for your enquiry; either by the date the WPBA was completed or the post during which the WPBA was completed.

The searches can interact in an unpredictable way however, so the following method is recommended:

Specify the post dates first. You can either specify posts within a date range, an academic year (Aug 1st to July 31st), or specify current forms only.

If you want to reduce the search further, insert a date range into the 'Forms submitted From:' boxes at the top of the page. Otherwise leave them blank.

e.g. 1 To search between 1st and 30th April 2014:

Select 2013-2014 from the 'post dates' options

In the 'Forms submitted From' boxes insert the date range 1/4/2014 to 30/4/2014

e.g. 2 To search for all WPBA completed by trainees in their current posts:

Select 'Current Posts' from the 'post dates' options

Leave the 'Forms submitted From' boxes blank

Specify the sample

Specify whether you want to search for trainees at a certain stage of training (1-3) by selecting the required group from the 'Grade' drop-down menu.

Specify the locations to want to search using the 'Location' drop down menu. You can search at the level of a LETB, trust or hospital.

Click 'Search Forms'

Creating a Form Count Report

Specify the date range

There are two ways to determine the date range for your enquiry; either by the date the form was completed or the post during which the form was completed.

The searches can interact in an unpredictable way however, so the following method is recommended:

Specify the post dates first. You can either specify posts within a date range, an academic year (Aug 1st to July 31st), or specify current forms only.

If you want to reduce the search further, insert a date range into the 'Forms submitted From:' boxes at the top of the page. Otherwise leave them blank.

e.g. 1 To search between 1st and 30th April 2014:

Select 2013-2014 from the 'post dates' options

In the 'Forms submitted From' boxes insert the date range 1/4/2014 to 30/4/2014

e.g. 2 To search for all forms completed by trainees in their current posts:

Select 'Current Posts' from the 'post dates' options

Leave the 'Forms submitted From' boxes blank

Specify the sample

Specify whether you want to search for trainees at a certain stage of training (1-3) by selecting the required group from the 'Grade' drop-down menu.

Specify the locations to want to search using the 'Location' drop down menu. You can search at the level of a LETB, trust or hospital.

Click 'Get Form Counts'

Viewing the location, stage of training and supervisors of all trainees

From the top menu click ‘Trainee Search’

Click ‘Search Trainee’

Accessing a Trainee’s Portfolio

You can view the portfolio of any trainee within your LETB.

Complete as many of the boxes as you are able.

Click ‘Search Trainee’

Click the magnifying glass icon next to the trainee’s name

Reviewing a Trainee’s portfolio

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.

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.

Other information

Within the trainee’s portfolio, other 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
Educational Supervisors Structured Report	Progression > Educational Supervisor’s Structured Report
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	
Absences	Profile > Absences
Personal Development Planning	Curriculum > Personal Development Plan

Employment history	Profile > Posts / Supervisors
Examination progress	Profile > Certificates and Exams

Completing an ARCP Form

Access the trainee's portfolio

From the side menu select Progression > ARCP

Click 'Add ARCP Form / Interim Review Form'

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

Next to 'ARCP' Click 'Create'

Complete the form

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 ARCP form saved as draft

From the side menu select Progression > ARCP

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.

Click 'Save'

Certifying completion of a Stage of Training

Access the trainee's portfolio

From the side menu select Progression > ARCP

Click 'Add ARCP Form / Interim Review Form'

Next to 'Stage 1/2 Training Certificate' Click 'Create'

Complete the form

Click 'Save'

Once you have completed the form, please contact the Faculty administrators (ficm@rcoa.ac.uk) for the next stage curriculum to be released to the trainee.