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

ICM ePortfolio

Guidance for Trainee 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 - Trainee

Contents

Accessing the ePortfolio

Once you have registered with the FICM you will be given a username and password to access the ePortfolio.

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'

If the FICM logo is not visible in the top left corner of the page, from the top menu select Select Role > ICM Trainee

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 two methods of finding message recipients and both can be used for the same message.

Searching for recipients who are your supervisors

Select the 'My Supervisor' tab.

Select the supervisor you wish to add, copy or Bcc into the message from the drop down list.

They will then appear in the "To" bar of your message.

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 ePortfolio 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'.

Recording a Post and Supervisor

For the purposes of the portfolio, a change in post is a change in hospital, department or phase of training.

For example, if I work at Sunderland Royal completing 3 months of stage 1 ICM, then 3 months of intermediate anaesthesia and then move to Gateshead hospital for a further 3 months of intermediate anaesthesia I will be working in three different posts. If I then remain at Gateshead for more anaesthesia but start higher training, that would be a fourth post.

If you know where you are going, posts can be entered in advance but the dates cannot overlap.

You should enter all posts, not just those in ICM.

On the top menu click Profile > Posts/Supervisors

Then click 'Add Post'

For grade; select your stage of ICM training (1-3)

Enter the start and end dates of the post (if you already have a post in your portfolio the start date defaults to the day after that post finishes)

For training period year, enter your year of training after completing the foundation programme.

For location, select ICM (even if the post wasn't in ICM) and then find the hospital in the drop down menu.

Click 'Step 2: Specialties' and select the specialty in which you are working (using the freetext option if it doesn't appear in the dropdown menu.

Click 'Step 3: Supervisors. This is where you will select your educational supervisor(s). It is up to you and your school's local arrangements how many people you select as educational supervisors, but you must select at least one. Once someone is identified as an educational supervisor, they can:

- Complete assessments without you needing to send a ticket.
- View all your portfolio entries for that post
- Initiate assessments and educational supervision forms.
- 'Sign off' competencies as complete.

To find an educational supervisor, search for them by entering their name into the 'name' box and clicking 'search'. Alternatively, leave the box blank and click 'search'. This will find all supervisors in your hospital.

You now need to click on the supervisor you wish to add and then click the right-facing arrow to move them from the 'Supervisors' box to the 'Added Supervisors' box. To undo this, select the supervisor and click the left facing arrow.

Once you have your supervisor(s) in the 'added supervisors' box, click 'Finish'.

Signing an educational contract

This contract is between you and your educational supervisor and will have been generated automatically. On the top menu click Profile > Declarations and Agreements.

Click 'Create'. If you agree with the declaration, click to sign and then save. You will need only need to do this once during your training programme.

Documenting your exam progress

It is important for the ARCP panel that you record all your professional exams not just those within ICM. You can record details of exams you have passed, but also details of when you are planning to sit exams.

From the top menu click Profile > Certificates and Exams

Complete the form for each examination. If you have completed a professional exam in full, you may choose not to record each of the individual components.

Click 'Save'

To upload evidence, from the certificates and exams homepage click 'Actions' > Upload. Note this uploads a file from your computer, not your personal library.

Writing a PDP

On the top menu click Curriculum > Personal Development Plan

Click 'Add New PDP'

Within the portfolio, each PDP is one objective. For example, if I 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.

Complete the boxes up to and including 'target completion date'.

Do not sign the form and don't let your supervisor sign it either (once signed it can no longer be edited).

Click 'Save'

On the next page you can either add a link, go back to the PDP homepage or add another PDP item.

Recording progress towards and completion of a PDP

On the top menu click 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).

Once you have found the PDP item you want to modify, click Actions > Edit

If edit does not appear as an option this is because it has been signed and can no longer be modified.

To record the details of an interim assessment, enter the date of the assessment and any comments.

Do not sign the form and don't let your supervisor sign it either (once signed it can no longer be edited).

Click 'Save'

To 'sign off' the PDP item, complete the form, then sign it by selecting your name from the drop-down menu before clicking 'Save'.

On the next page you can either add a link, go back to the PDP homepage or add another PDP item.

You will probably want to add a link as evidence of completion. You may also want to link the PDP to a curriculum item, which would save you having to link the evidence again and would give your ES more understanding of how that item has been addressed.

Recording an absence

It is a requirement of the ARCP process that you disclose any absences. The portfolio allows you to keep a record. Annual and Study leave need not be recorded.

From the top menu select Profile > Absences.

Click 'Create', complete the form and click 'Save'.

Completing an MSF

On the top menu select Assessments > MSF.

Check the correct post appears from the drop-down menu.

Before you can send out an MSF you must complete a MSF Self TAB. You can do this by clicking 'Create'.

Once you have done this you will be able to send out tickets for your MSF. The portfolio gives a number of suggested requests for each professional group, and you need a total of at least 12.

For each person you want to complete your MSF, complete the entries in the 'Create a ticket for your TAB' Box and click 'Add'.

The ticket will be sent, and the assessor's details will appear in the table above.

Checking the progress of your MSF

On the top menu select Assessments > MSF

In the table of assessors you will see from the status column whether each assessor has completed the MSF.

Viewing your MSF

On the top menu select Assessments > MSF

At the bottom of the page, your MSF summary will appear once it has been released by your educational supervisor.

Completing a WPBA

There are three ways of adding a WPBA to your portfolio. These are:
1. Uploading a paper WPBA
2. Requesting an assessment from your educational supervisor
3. Requesting an assessment from someone other than your educational supervisor.

1. **Uploading a paper WPBA**
   You would use this option if you have completed an assessment in another portfolio and wish to use it as evidence towards the ICM curriculum. There is no mechanism to electronically transfer a WPBA to the ICM ePortfolio from another ePortfolio.

   If you have a WPBA you want to use as evidence in two portfolios, you are generally better completing it in the other portfolio and adding it to this portfolio second. This is because the ICM portfolio will recognise a scanned document as a DOPs, CEX etc. whereas not all other portfolios can.
   On the top menu click Assessments > Work Based Assessment.

   Click 'Add New Assessment'.
   Check that the post you want to file the assessment against is correct.

   Click 'Create' next to the type of assessment you want to upload.

   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.

   Select 'Upload File from Personal Library' for the input method.

   Click 'Select File…'

   If the file is already in your personal library, select it and then click 'Save Selected File' in the top right hand corner.

   If you have not uploaded the file, click 'Upload a file to your library', upload it and then save it by clicking 'Save Selected File' in the top right hand corner.

   Note that the file status must be set as 'shared' – if it is not this can be selected by selecting the file, clicking 'Actions' > Edit > Shared > Save.

2. **Requesting a WPBA from your educational supervisor**
   This method is used when you are with your supervisor and want to complete an assessment there and then.

   On the top menu click Assessments > Work Based Assessment.

   Click 'Add New Assessment'.

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

   Click 'Create' next to the type of assessment you want to create.
   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, sign the form and click 'Save'

3. **Requesting a WPBA from someone other than your educational supervisor**
   On the top menu click Assessments > Work Based Assessment

   Click 'Request External Assessment'

   Click 'Request New Assessment'

   Check that the post you want to file the assessment against is correct.
   Select the WPBA you would like to complete.

   Once a form type has been selected, pre-fill boxes will appear which will give you the option to add a document title and a comment about the case or assessment, which the assessor will see when they open the form for completion. These fields are optional.

   Click 'Next'

   Enter the assessors email

   Click 'Next'

   Complete the boxes if required (only name, job title and location are mandatory)

   Ensure "Send email to assessor' is selected as 'yes'
   Click 'Finish'.

   Once the assessor has completed the assessment you will receive an email and also a message will appear in the 'messages' section of the portfolio.

   The assessor is allowed 30 days to complete the assessment. If after seven days they have not completed the assessment, an email reminder can be sent.

Sending an email reminder for an external assessment

If an external assessment has not been completed after seven days of the request being sent, and email reminder can be sent.

From the top menu click Assessments > Ticket Requests.

You will then see a list of the requests you have made for external assessments. If more than seven days has passed since the request, the 'Send Reminder' button will appear next to the request. Clicking this button sends an email reminder.

Completing an audit or quality improvement professional activity

From the top menu select Profile > Professional Activities.

Click 'Add New Professional Activity'.

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

Click 'Create'.

Complete the form, sign it and click 'Save'.

To add evidence to the activity, click 'File In The Personal Library' in the 'Add New Link' box.

If the file is already in your library, select it then click 'Actions' > Add link.

If the file is not already in your library, click 'Upload a file to your library', upload it and then save it by clicking 'Save Selected File' in the top right hand corner. It can then be linked as above.

Note that the file status must be set as 'shared' – if it is not this can be selected by selecting the file, clicking 'Actions' > Edit > Shared > Save.

Completing an expanded case summary

You will write your case summary outside of the ePortfolio, the instructions below describe how to arrange for your ECS to be marked, and how you record this in the portfolio.

Once you have written an ECS, send a copy to your assessor.

Then from the top menu click Assessments > Work Based Assessment.

Even if your ECS is being marked by your educational supervisor, it would make sense to do this via a ticket. The reason for this is that it allows the assessor time to consider their marks rather than having to complete the assessment straight away.

Click 'Request New Assessment'.

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

Select 'Expanded Case Summary'.

Click 'Next'.

Enter the assessors email.

Click 'Next'.

Complete the boxes if required (only name, job title and location are mandatory).
Ensure "Send email to assessor' is selected as 'yes'.

Click 'Finish'.

You should link an electronic copy of your expanded case summary to your assessment once it is completed.

Signing a completed external assessment

When an external assessment has been completed, you will receive an email notification.

From the top menu click Assessments > Work Based Assessment.

The completed assessment will be listed.

Click 'Edit' to view the assessment and then to sign it by selecting your name from the dropdown menu.

Click 'Save'.

Recording a professional activity

The professional activity section is where you 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

From the top menu select Profile > Professional Activities

Click 'Add New Professional Activity'

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

Click 'Create'

Complete the form, sign it and click 'Save'

To add evidence to the activity, click 'File In The Personal Library' in the 'Add New Link' box.

If the file is already in your library, select it then click 'Actions' > Add link

If the file isn't already in your library, click 'Upload a file to your library', upload it and then save it by clicking 'Save Selected File' in the top right hand corner. It can then be linked as above.

Note that the file status must be set as 'shared' – if it is not this can be selected by selecting the file, clicking 'Actions' > Edit > Shared > Save.

Uploading your logbook / logbook summary

Unfortunately, at present, there is no dedicated section/template on the ePortfolio for a Logbook. Trainees are free to use their preferred logbook and upload it to the ePortfolio as required.

To assist with a uniform filing system for this an assessment Logbook form has been created, this can be accessed under the assessment menu.

Once selected input the date range that your logbook covers and then upload your chosen logbook.

This is not a compulsory filing section but it will allow assessors to easily view the logbook, along with other assessments in one place, as required for supervision meetings and ARCP meetings.

Recording your progress towards the 'top cases'

The Top 30 cases have now been added to the ePortfolio.

They reside as a separate curriculum syllabus within the ePortfolio, which will remain available to you throughout your training. You can link assessments to the cases using the same method as described below for linking evidence to the curriculum.

Linking evidence to the curriculum

You can link a piece of evidence by:
- Clicking 'Link' whenever it appears next to an item
- Clicking 'Curriculum Item' from the ''Add New Link' box that appears once a form has been completed.
- Adding a link from the curriculum item itself by clicking 'Link'

With either of the first two methods, it is possible to link an item to multiple curriculum items at the same time.

e-LfH Link

It is now possible for ICM trainees to establish a link, within the ICM ePortfolio, to any e-ICM modules undertaken within e-Learning for Healthcare.

This can be done by selecting e-LfH from the menu bar and following the prompts to input your eLearning login details.

Please note, data from e-LfH is shared with ePortfolio once a day. As such, please wait at least 24 hours from linking your account or performing an activity in e-LfH for details to be displayed in the ePortfolio.

Printing a form for uploading to another portfolio

On the top menu click Profile > Download Portfolio

Click 'Create'

Under item source select 'Forms' and check the correct post has been selected.

You can select at this stage whether you want a covering page detailing your post and supervisor details, and whether you want the linkages to appear or not.

Find the first form you want to print in the 'available items' box and click it.

Click the right arrow to move it to the 'selected items' box.

You can repeat this process as many times as is required until all the forms you want to print appear in the 'selected items' box.

If you move a form by accident, this can be undone by selecting it again and clicking the left arrow.
Click 'Create PDF'

A PDF document will now appear on the Download Portfolio homepage.

To print the file, click 'Actions' > View and then print as usual.

To provide a description for the file in case you wish to access it later, click 'Actions' > Edit

To produce a web-link for someone to be able to view the file without having to print it, click 'Actions' > Share.

Viewing your progress towards the curriculum

From the top menu select Curriculum > The name of the curriculum you are following.

Click 'Expand All'.

You will then be able to view all of the competencies within the domains and the evidence you have linked.

If your educational supervisor feels you have provided sufficient evidence for a competency item to have been achieved, the red spot will have been turned green (this change is made by your ES).

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

To link evidence click the 'link' button.

You can also make a self-assessment of your competence for each item. To do this click the pencil icon. The rating box defaults to the level of competence required for your stage of training, but you can select a higher level of competence if you wish to do so using the dropdown menu. You can also write a comment to explain to your supervisor and the ARCP panel to explain the evidence you have linked.

When you are finished click 'Save'

Sending a ticket from the Curriculum

When you are confident that you have enough evidence linked to a competency you can send a ticket directly to your Educational Supervisor from the Curriculum pages within the ePortfolio .

Please note that this ticketing function is slightly different to the usual ticket creation process on the WPBA pages.

To Start the process select the ticketing symbol.

Within a domain you can select multiple competencies to send on one ticket request, but a new ticket request will need to be sent for any competencies that fall under separate domains.

So for example, you could send one curriculum sign off ticket covering domain 1, which referred to competency 1.1, 1.2 and 1.3 but if you also wished to send a curriculum ticket request for a competency under domain 2 that would need to be on a separate ticket.

Once the create ticket symbol has been selected a stepped ticket creation process will open so all you have to do is follow the prompts.

Viewing your progress during a placement

An easy way to view the number of WPBAs you have completed during a placement is to select from the top menu Progression > Summary Overview. This brings up a page detailing all forms you have completed according to the Year or Post.

Recording an educational supervision meeting

The form for recording an educational supervision meeting can only be created by your ES.

They will need to do the following:

Creating a form

On the top 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 relevant form, initial, interim or final.

Recording a meeting

For an initial, interim or final meeting, complete the boxes follow the form requests in detail.

Click 'save'.

The forms can also be accessed through the trainee's summary page.

Organising your personal library

How you arrange your personal library is up to you but it makes sense to have some sort of system so you can find files again.

On the top menu click 'Profile' > Personal Library

To open a folder click once on the folder icon. If the folder is empty it will appear as white. If there is something in the folder it will be blue.

To create a new subfolder, click to select the folder in which you want the subfolder to appear. Then click 'Create new folder'. Give the folder a name and click 'Save'

To delete a folder click 'Actions' > Delete. You will only be able to delete empty folders.

To move a file or folder, select the file or folder and drag it to its new destination.

Uploading a file to your personal library

Select the folder you want to put it in.

Click 'Actions' > Upload a File.

Click 'Select' and then identify the file from your computer.

You can provide a description if desired (although the value of this is limited) and set the file status. A file must be given 'shared' status if it is to be linked to forms or the curriculum.

Starting the Next Stage of Training

Once you have met all the requirements of a stage of training, your Regional Advisor will complete a Stage 1/2 Training Certificate (depending on local arrangements you may need to contact your RA to ask them to do so).

To view the certificate, from the top menu select Progression > ARCP.

Once the RA has completed this form, they will contact the Faculty administrators who will update your portfolio for the next stage of training. If the Stage 1/2 Training Certificate is present but your portfolio has not been updated, please send an email to contact@ficm.ac.uk to make sure the Faculty are aware.