**THE FACULTY OF PUBLIC HEALTH TRAINING E-PORTFOLIO SESSION (18/10/2012)**

**Introduction**

An e-portfolio training session was held on the 18th October 2012 at the University of Manchester as part of the monthly Public Health Grand Rounds.

Purpose

The purpose of the session was for users (including educational supervisors, ARCP panel members and specialty registrars) to gain an understanding about how best to use the training e-portfolio and to enable them to champion its use locally.

Objectives

1) For educational supervisors and specialty registrars to be able to confidently use and complete the training e-portfolio including key documents

2) For educational supervisors and specialty registrars to understand what the requirements are for the ARCP and how specialty registrars may impress

3) For ARCP panel members to be able to easily locate key evidence pertinent to the ARCP process.

4) For all to have the opportunity to discuss any issues they have encountered with the training e-portfolio and to receive advice and tips on how to manage these.

Format

A 2-3 hour session which included a brief formal presentation, a practical demonstration of how to use the training e-portfolio and deal with commonly encountered problems and an interactive question and answer session.

**The Session**

Discussion during the session was as follows:

1. **Some general feedback regarding the e-portfolio was provided**

* Generally ok to use
* Has a particular strength in its ability to link evidence electronically
* Can be difficult to navigate and not always user-friendly (it was questioned whether or not educational supervisors had been consulted on its initial design and Russell stated that they had been)
* In order to meet the needs of specialty registrars, educational supervisors and ARCP panel members, it needs to be able to be used as quickly and as easily as possible.

1. **A presentation with respect to the background of the e-portfolio**
2. **Demonstration of how the e-portfolio works**
3. **Questions and comments as follows:**

* **Obtaining access to the e-portfolio upon starting the training scheme – is there any way to speed this up?**

It was suggested that a list of the new intake of registrars could easily be provided to the FPH and that access to the e-portfolio could be withdrawn if enrolment did not then occur. Clearly this is something that needs further consideration and Russell advised that the FPH are working on this issue. It was pointed out that delayed access is challenging to the process of encouraging registrars to keep up-to-date with their e-portfolio.

* **How do educational supervisors obtain access to the e-portfolio?**

Please contact the FPH and then the relevant checks can be made with the Deanery.

* **Does educational supervisor access expire?**

No but the initial link sent to activate access may expire if not activated within a certain time period.

* **How do I find a supervisor on the e-portfolio to sign off an assessment (they seem to already have access to my e-portfolio)?**

Please contact the FPH with individual issues. Russell pointed out that the nature of access to the e-portfolio is role-dependent i.e. ARCP panel members will only automatically have read access.

* **Why is there only space to list ‘primary medical qualification’ on the home page?**

This does not seem to be an active field and arrangements could be made for this to be hidden.

* **Is there a specific place for documents such as Form 4 – where should I put them?**

It was pointed out that there is a lack of clarity about where some mandatory forms should be placed. It was suggested that certain forms could be placed within the administration box on the home page.

Furthermore, it was highlighted that the view of the e-portfolio that the ARCP panel have is confusing and that documents were very difficult to locate. It was suggested that it may be useful to have the view and order in the same format as the paper portfolio. Russell suggested that the FPH were currently looking at this and they are hoping to make some amendments before Christmas. It was also suggested that it may be useful to have subsections on the landing page to make it clearer – Russell stated that this is more of a presentational challenge for the software.

* **Why are there different views for registrars and the ARCP panel?**

Russell highlighted that there is an ARCP view available for the Registrar which is very similar to what the panel will see.

* **Could we please have the option of completing a learning agreement for only 3 months? (It is difficult to complete a six month learning agreement when you haven’t yet started your placement following the short HPU placement).**

It was pointed out that there is nothing to prevent two six month learning agreements being generated within a six month period. However, the Head of School suggested that he would not be keen to sign off three monthly learning agreements. Russell suggested that removing Head of School approval from learning agreements would need to be discussed further as there are governance issues surrounding this. Asking zonal TPDs to provide a third sign off for such learning agreements, providing the option of only a two-way sign off for some learning agreements or simply completing a paper learning agreement for the short health protection attachment were mooted as ideas.

* **Is there a quicker way for supervisors to sign off learning outcomes?**

It was pointed out that this has been recently improved and that outstanding assessments will appear on the tasks menu for supervisors. It was also highlighted that convincing evidence of achievement of learning outcomes needs to be presented within the e-portfolio.

* **Who fills in which parts of a case-based discussion (CBD) form?**

It was agreed that the best way to do it was for the registrar to sit down with their educational supervisor at a computer and complete it together. However, Russell agreed to consider removing the mandatory completion of the graded performance sections by registrars. Therefore, if the registrar and educational supervisor couldn’t sit down together, then the educational supervisor could still score them on the form independently.

* **Can an activity summary sheet span two phases?**

Yes but linked evidence cannot.

* **Can I sign off some phase 3 competencies if I am yet to sign off some phase 2 competencies?**

No. You can begin to gather evidence for all the phases (including asking for sign off of activity summary sheets) but you cannot sign learning outcomes off.

* **Is there an expectation of how detailed supervisors’ comments should be?**

The ARCP panel need to be able to observe the thought process behind sign-off of learning outcomes.

* **What specifically do we need to do to get our e-portfolio ready for ARCP?**

It was suggested that registrars start saving activity sheets in draft, making sure that supervisors are aware of the ARCP’s approach and to try not to leave all the signing off of the learning outcomes until the last minute. Registrars were also reminded that ARCP dates need to be correctly set up.

* **Is it possible to complete a Multi-Source Feedback (MSF) via the e-portfolio?**

No. It had not been embedded in the e-portfolio due to governance reasons and lack of demand initially. It was emphasised by the Head of School that an MSF should be completed through a third party and that robust and validated tools should be used. This is only formally required in Phase 3 (though encouraged before) and the Head of School advised that an application for funding could be made to the Deanery for use of a specific tool.

* **What should you do when a document is too big to upload?**

Russell suggested that registrars should signpost it to a reference and ensure that its contents are adequately described.

* **Can evidence be added to an activity summary sheet once it is signed off?**

No. It is suggested that if a significant piece of evidence needs to be added then a new activity summary sheet should be generated. Registrars argued that this promoted the practice of ‘leaving it to the end’ to ensure that all relevant pieces of evidence were included initially.

* **How does my educational/academic supervisor complete a report?**

Russell demonstrated how this could be done. Essentially the report is generated initially by the supervisor and then sent to the registrar for approval. Russell reminded us that an ARCP would need to be set by the trainee prior to this (if the date is not known then it may be estimated and changed at a later date).

* **How do I create an ARCP?**

Russell demonstrated how this could be done. He emphasised that registrars should ensure that the relevant ARCP is being populated with evidence as they progress through the year.

* **What are the safety mechanisms available to prevent registrars inputting work into phase 3 when they are in earlier phases?**

Russell advised that the purpose of the e-portfolio was to store the information and that the face to face meeting and ARCP are the mechanisms to control this.

* **How can you make the e-portfolio reflect the fact that all phase 1 learning outcomes have been signed off (thereby becoming ‘green’) if you started the e-portfolio in phase 2?**

This could theoretically be carried out by scanning the completed phase 1 learning outcome sheet attaching it as evidence to a activity sheet then linking it to all the phase 1 learning outcomes and sending it to your supervisor to be signed off.

* **Why are educational supervisors not able to look at comments from work previously carried out by the trainee?**

It was argued that this made the current assessments more objective and that a formal handover should occur between educational supervisors to discuss any significant issues.

* **What is the purpose of the Form 4 – it is very similar to the educational supervisor report which will have been completed only weeks before?**

The Head of School advised that Form 4 specifically addresses the issue of probity. Registrars were advised to try to use it in the most useful way possible.

**General advice and information from the ARCP panel**

* Put yourself in the panel’s shoes and make everything as simple and as clear as possible.
* The panel is not there to assess you, rather they are there to assess whether the assessments of you are fair (‘does assessment of you hold water?’). If they are not satisfied then a face to face meeting is requested. One in ten registrars and registrars at certain stages of training will be invited to panel anyway.
* The ARCP panel can access registrars’ e-portfolios before the ARCP date. Two members are asked to lead on each registrar’s ARCP and will familiarise themselves with the registrar’s work beforehand. It was suggested that other schools may carry out the whole process electronically but locally a face-to-face meeting for the panel was felt to be more appropriate. One person (usually the Head of School or zonal TPD) is able to wander around.
* Make the most of the opportunity to write a letter to the panel – provide roughly one side of A4 explaining how your e-portfolio is organised and any important issues.
* Be available on the telephone to discuss any issues.
* Educational supervisors should ensure that the ‘areas for improvement’ section of their report is completed.
* Two to three pieces of evidence is usually enough to sign off a learning outcome (‘quality not quantity’). However, it was pointed out that the e-portfolio does not allow registrars to retrospectively select the best 2 pieces of evidence to demonstrate that a competency has been achieved. It was suggested that registrars should have enough confidence to request learning outcome sign off when enough evidence has been provided. Furthermore, educational supervisors could reflect upon this in their comments i.e. ‘these pieces can contribute but these two pieces really address this outcome’.

**SUMMARY**

The session proved useful for learning about how to overcome some of the difficulties encountered in using the e-portfolio. Furthermore, it enabled open discussion with the Faculty of Public Health regarding suggestions for improvement. The need for future similar sessions will be reviewed over the coming year.

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