



**FACULTY OF  
PUBLIC HEALTH**

**TRAINING E-PORTFOLIO**  
REGISTRAR GUIDANCE MANUAL

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*Last updated: February 2015*

## Contents

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<b>1. Introduction</b>	<b>3</b>
<b>2. Editing and Managing your Profile</b>	<b>5</b>
<b>3. Adding and Managing Evidence</b>	<b>8</b>
Upload evidence	9-11
Delete an Evidence item	13
Edit Evidence details and overwrite the Evidence file	14
Create/Edit relations with Learning Outcomes	16
Filtering Learning outcomes	22
<b>4. Adding and Managing Activities</b>	<b>23</b>
Linking Activities to Evidence and Learning Outcomes	28
<b>5. Submit a Learning Outcome Sign-off Sheet</b>	<b>36</b>
View Approved LOSOS	38
<b>6. Creating and Managing ARCPs</b>	<b>41</b>
Access to an Existing ARCP record item	43
<b>7. Upload personal documents</b>	<b>44</b>
<b>8. Educational/Academic Supervisor Reports</b>	<b>47-53</b>
<b>9. Learning Agreement Forms</b>	<b>54</b>
Update a LAF (if rejected)	56
View Approved LAF	56

## Introduction

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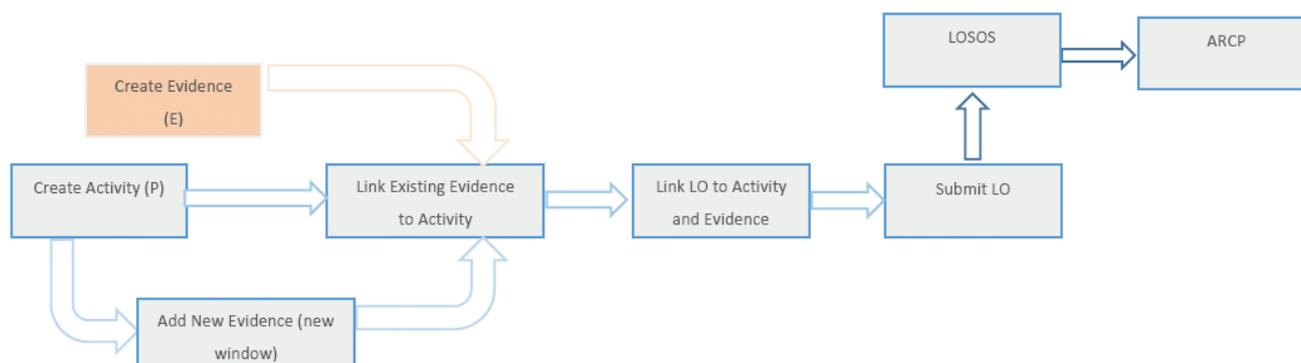
The Faculty of Public Health (FPH) electronic portfolio (e-Portfolio) system provides Specialty Registrars with a central platform for the management of information and documentation on progression of learning against the public health specialty training curriculum ([http://www.fph.org.uk/specialty\\_training](http://www.fph.org.uk/specialty_training)) during their time in training. The e-Portfolio allows trainees to relate documentation and evidence to the curriculum and incorporates the ability to record various sign offs.

The information within the e-Portfolio is the responsibility of the Registrar to maintain and keep up to date. The e-Portfolio is to be used in conjunction with the 2007 and 2010 public health curriculum and assessment systems. Policy on how training is organised and arranged can be found within the Gold Guide.

The training e-Portfolio is managed by the Registrar who must reflect on and record their achievements on an on-going basis. The e-Portfolio system has NOT been designed to replace face-to-face meetings, or be used as the sole method of communication between registrars and supervisors, but is intended to be used as a complimentary tool to aid recording training activity.

The diagram below illustrates the progression through the e-portfolio functionality from start to finish in terms of adding evidence through to submitting an ARCP.

### Workflow.



All users must also give careful consideration to where and when they are logging into the portfolio. Accessing the portfolio in public places or using shared computers is not a safe and secure means of e-Portfolio usage and is not advised.

This guidance manual is a working document and any comments about how it can be improved are welcomed at any time. These can be emailed to: [educ@fph.org.uk](mailto:educ@fph.org.uk)

## E-Portfolio Homepage

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### General overview of Left Bar menu

Having logged into the system you are presented with the welcome screen. The left bar menu shows three separate sections ('My Portfolio', 'Learning Outcome' and 'ARCP') and a message displaying the role/roles associated to the user.

**My Portfolio** allows you to:

- add/view/edit/delete activities (provided they are not locked)
- add/view/edit/delete pieces of evidence (provided they are not locked)
- Link bundles of evidence to activities
- View and edit and save your profile

**Learning Outcome** will allow you to assign activities and associated evidence to different learning outcomes and then submit for approval to your project/academic supervisor.

**ARCP** will allow you set up your ARCP dates and review previous ARCPs

The screenshot displays the left-hand navigation menu of the E-Portfolio system. At the top, a green-bordered box contains the text 'You are logged in as Registrar' and a 'Role' button. Below this, a red-bordered box encompasses three main menu sections, each with a blue header and a list of options:

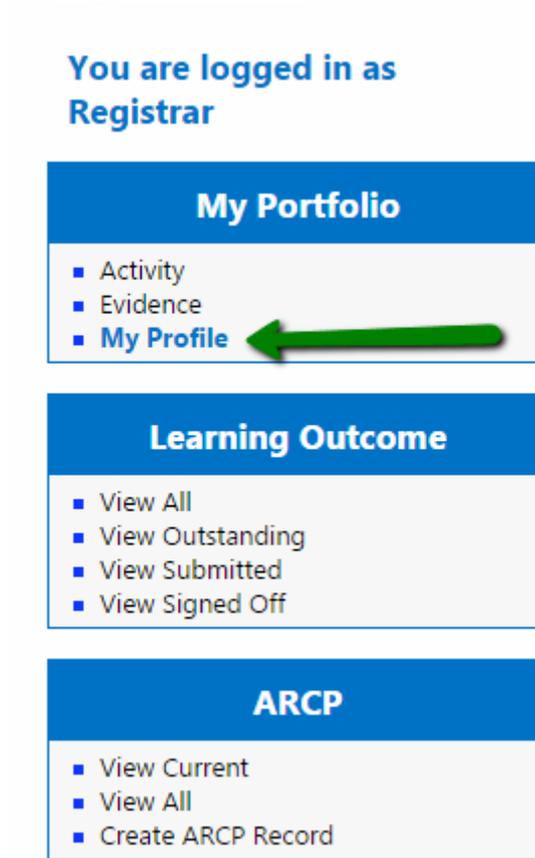
- My Portfolio**
  - Activity
  - Evidence
  - My Profile
- Learning Outcome**
  - View All
  - View Outstanding
  - View Submitted
  - View Signed Off
- ARCP**
  - View Current
  - View All
  - Create ARCP Record

## Editing and Managing Your Profile

---

### Edit 'My Profile' information

1. Go to My Profile -> My Profile and Click "My Profile"



2. The most of the fields of the form can be updated apart from the "First Name" and the "Last Name" fields and the "Region" field (if has already been set). All the fields that cannot be updated are greyed out.

## My Profile

Region:	London
Title:	Sir.
First Name:	Trillium Name new
Last name:	Trillium LastName
Job Position:	test position
GMC No:	gmc
Email:	support@trilliumsystems.net
Telephone:	tel
Home Address:	home addr
Home Address Region:	home region
Home Address City:	home city
Home Address Country:	address country
Home Address Postcode:	home addr postcode
Work Address:	work addr
Work Address Region:	work region

### 3. Fill in the form with the information you want to update and Click “Update Profile”

Current Phase:	Phase 1
FPH ID:	update fph id
Educational Supervisor region:	Scotland
Educational Supervisor:	Eric Paul Bajjal
Training Programme Director region:	West Midlands
Training Programme Director:	Robert Forbes Cooper
Latest CV:	Nothing to show right now

Update Profile



4. Select an Educational Supervisor and a Training Programme Director by using the “Educational Supervisor Region” dropdown as filter or directly typing the supervisor name into the “Educational Supervisor” or “Training Programme Director” textboxes. The supervisor name, if exists will be prepopulated while typing.

Educational Supervisor:	ka
Training Programme Director region:	
Training Programme Director:	
Latest CV:	

Update Profile

Karen Patricia Adam  
 Karen Nancy Foster  
 Pamela Kate MacIntyre  
 Alison Katherine McCallum  
 Susan Karen Payne  
 Maria Kathleen Rossi



5. If the no “Educational Supervisor” or “Training Programme Director” are set in the profile, the system does not allow to update the details showing an error message.

Update Profile

Please select a valid Educational Supervisor and Training Programme Director to update your profile

6. In case you are uncertain about the supervisors but you want to update your personal information anyway Set as TPD and ES in the profile the user “System SU” from typing “System SU” in the “Educational Supervisor” and “Training Programme Director” fields. Once these fields are set this form can be updated at any time.

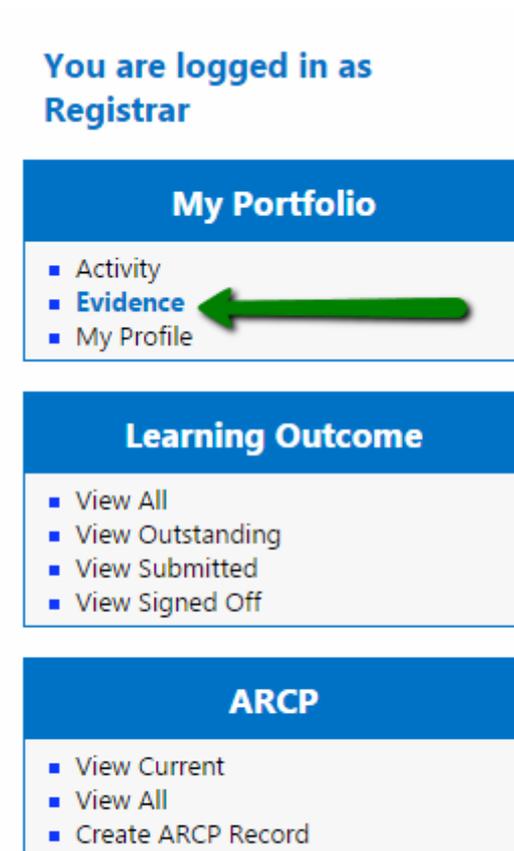
PPH ID:	<input type="text"/>
Educational Supervisor region:	<input type="text" value="- All Regions -"/>
Educational Supervisor:	<input type="text" value="syst"/> <input type="button" value="⌵"/>
Training Programme Director region:	<input type="text" value="System SU"/>
Training Programme Director:	<input type="text" value="- Select -"/> <input type="button" value="⌵"/>
Latest CV:	Nothing to show right now

## Adding and Managing Evidence

---

### View Evidence list

1. Go to My Portfolio -> Evidence and Click "Evidence"



2. The list shows all the Evidence inserted into the system by your user.  
The "Search bar" allows the filtering of the results in the grid while the "Paging section" allows the navigation through the table by clicking one of the page indexes at the bottom of the grid.  
In addition to this, it is possible by clicking on any of the headers, to sort the items in the grid alphabetically or chronologically depending on the type of information of the column.  
Please note that all the grids of this kind in the system have those types of functionality (filtering/sorting/paging)

**Evidence Dashboard**

Add new Evidence

My Evidence list

Show 10 entries

Search:

Evidence Name	Type	Date Added	Is Locked
ext-powerp-ico.png	File	18/11/2014 12:54:55	No
ext-doc-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:54:55	No
ext-pdf-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:52:34	No
ext-doc-ico.png	File	18/11/2014 12:52:34	No
ext-pdf-ico.png	File	18/11/2014 12:52:34	No
bu	URL (Website Address)	04/11/2014 18:15:37	No
url	URL (Website Address)	04/11/2014 18:11:53	No
Another test	URL (Website Address)	04/11/2014 18:05:17	No

Showing 1 to 10 of 34 entries

Previous 1 2 3 4 Next

## Upload Evidence file/files

1. Follow the steps 1 and 2 described in the “**View Evidence list**” process to access the “Evidence Dashboard” page.
2. Click “Add new Evidence”

**Evidence Dashboard**

Add new Evidence

My Evidence list

Show 10 entries

Search:

Evidence Name	Type	Date Added	Is Locked
ext-powerp-ico.png	File	18/11/2014 12:54:55	No
ext-doc-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:54:55	No
ext-pdf-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:52:34	No

3. Drag and drop a single or multiple files into the greyed area in the centre of the page or just Click on the grey box to select the files using the file explorer.

## Add Evidence

Go back to Evidence Dashboard

Please use the box below to upload one or more files:

Drag & Drop file here

Or this button to add a Reference or a URL

Add Reference or URL

- Provide a short description for the files now shown in the grey area or eventually remove the files by using the "Remove" buttons on each file preview. Click "Upload button" and wait until the process is complete.

Please use the box below to upload one or more files:

FPH_Tutorial.d 1.5 MB Remove file my short description 1	Managing Users.docx 1.5 MB Remove file another description	Registrar Training.docx 0.3 MB Remove file another
---	---	---

Remove buttons

Description fields

Upload files      Upload button

- If the process is successfully complete Click "Close" in the confirmation modal window generated by the process to be redirected to the "Evidence Dashboard"

Upload complete
×

The files have been successfully uploaded. Please use the 'Close' button to go back to the upload page.

Close

6. The “Evidence Dashboard” is now showing the 3 uploaded files, now ready to be associated to activities.

**Evidence Dashboard**

Add new Evidence

**My Evidence list**

Show  entries Search:

Evidence Name	Type	Date Added	Is Locked
Registrar Training.docx	File	28/01/2015 12:07:46	No
FPH_Tutorial.docx	File	28/01/2015 12:07:46	No
Managing Users.docx	File	28/01/2015 12:07:46	No
ext-powerp-ico.png	File	18/11/2014 12:54:55	No
ext-doc-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:54:55	No
ext-pdf-ico.png	File	18/11/2014 12:54:55	No
ext-generic-ico.png	File	18/11/2014 12:52:34	No
ext-doc-ico.png	File	18/11/2014 12:52:34	No
ext-pdf-ico.png	File	18/11/2014 12:52:34	No

Showing 1 to 10 of 37 entries Previous  2 3 4 Next

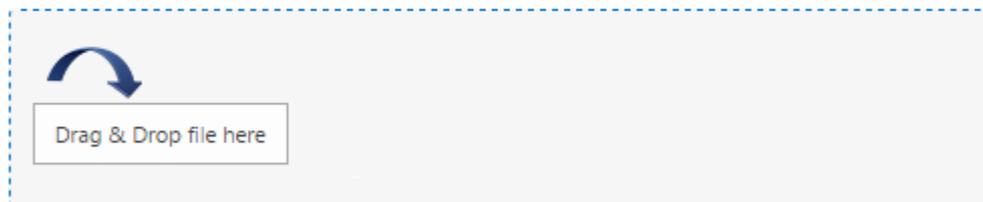
## Add Evidence (Reference or URL)

- Follow the steps 1 to 3 (included) described in the “**Upload Evidence file/files**” process.  
Click “Reference or URL”

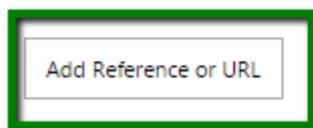
### Add Evidence

[Go back to Evidence Dashboard](#)

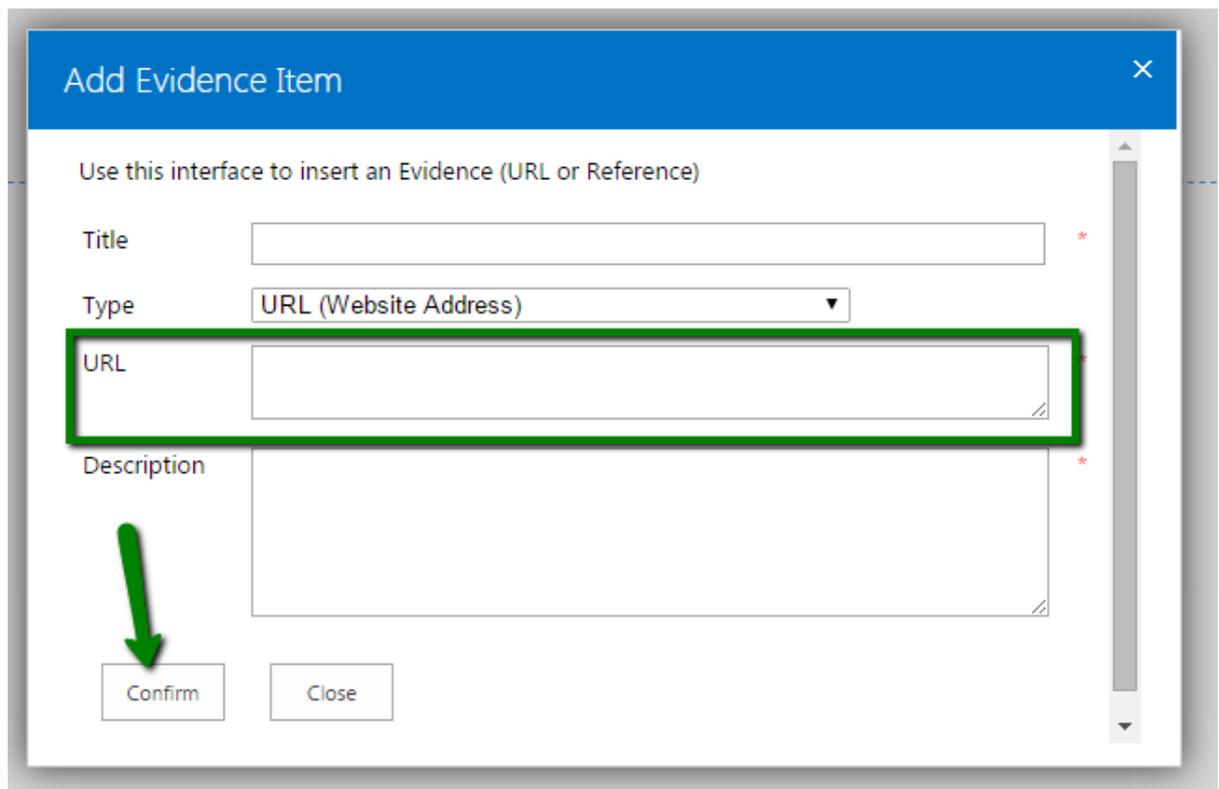
Please use the box below to upload one or more files:



Or this button to add a Reference or a URL



- Complete the form populating all the fields (all mandatory) and providing a valid URL (which must include the prefix <http://> such as “<http://www.google.com>”)



**Add Evidence Item** [X]

Use this interface to insert an Evidence (URL or Reference)

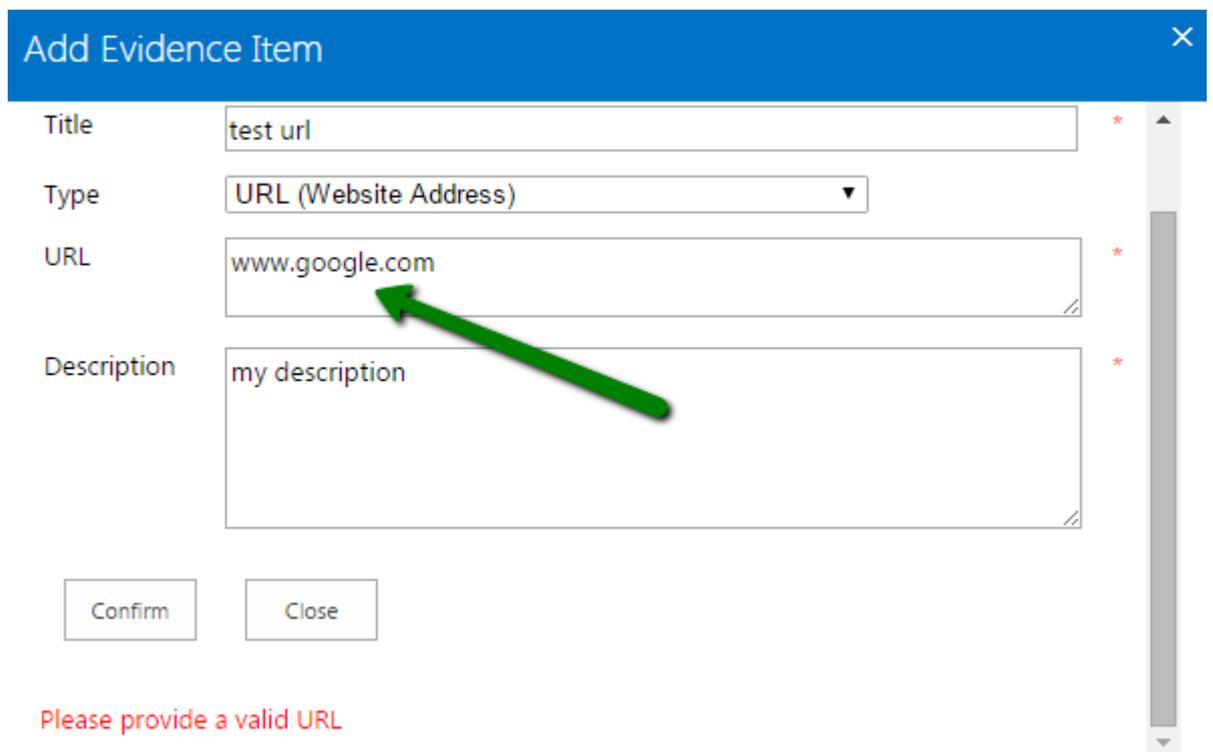
Title

Type

URL

Description

3. In case the provided URL is not valid or one of the other fields is left blank the modal window shows this error shown at the bottom of the pop-up. In this case repopulate the form with valid data and resubmit by using the **“Confirm”** button.



**Add Evidence Item** [X]

Title

Type

URL

Description

Please provide a valid URL



Delete Evidence
×

Title:

Type:

Description:

Related Activity: No related activities for this evidence item

Download

**Do you want to delete permanently this evidence?**

**All the associations with Learning Outcomes and Activities will be deleted**

### Edit Evidence details and overwrite the Evidence file

1. Follow the steps 1 and 2 described in the **“View Evidence list”** process to access the **“Evidence Dashboard”** page.
2. Click **“Edit Item”**. Please note that you can access to this functionality only for not **“locked”** Evidence.

**Evidence Dashboard**

**My Evidence list**

Show  entries

Search:

Evidence Name	Type	Date Added	Is Locked
feed.jpg	File	28/01/2015 14:22:21	No
Brixton.png	File	28/01/2015 13:46:31	No

Showing 1 to 2 of 2 entries Previous  Next

3. To re-upload the file Click on the greyed area or Drag and Drop a single file into the area using the same approach used to insert an Evidence, then Click **“Submit”**

The screenshot shows the 'Evidence Panel' interface with the 'Associations' tab selected. The form contains the following fields and elements:

- Title:** A text input field containing 'feed.jpg'.
- Type:** A dropdown menu set to 'File'.
- Description:** A text area containing 'my feed'.
- Related Activity:** A text label stating 'No related activities for this evidence item'.
- Download:** A button with a download icon.
- Overwrite file:** A section containing a file upload preview for a file named '39.7 KiB' with a 'Remove file' button below it.
- Submit file:** A button highlighted with a green box and a green arrow pointing to it.
- Confirm:** A button at the bottom left.
- Close:** A button at the bottom center.

4. If the process is successfully completed the page refreshes and allows you to eventually change the information such as the old title and the old description. Update the "Title" and "Description" fields if needed and then Click "Confirm"

Evidence Panel ×

Detail
Associations

Title:  \*

Type:

Description:  \*

Related Activity: No related activities for this evidence item

Download

Overwrite file 

Drag & Drop file here

## Create/Edit relations with Learning Outcomes

The prerequisite of this process is the existence of a relation between an activity and the evidence which is going to be associated to LO (shown in the [Activity](#) section of this document).

1. Access the “Evidence Dashboard” as described in the previous processes and Click “**Edit Item**” (only available for not locked Evidence).

**Evidence Dashboard**

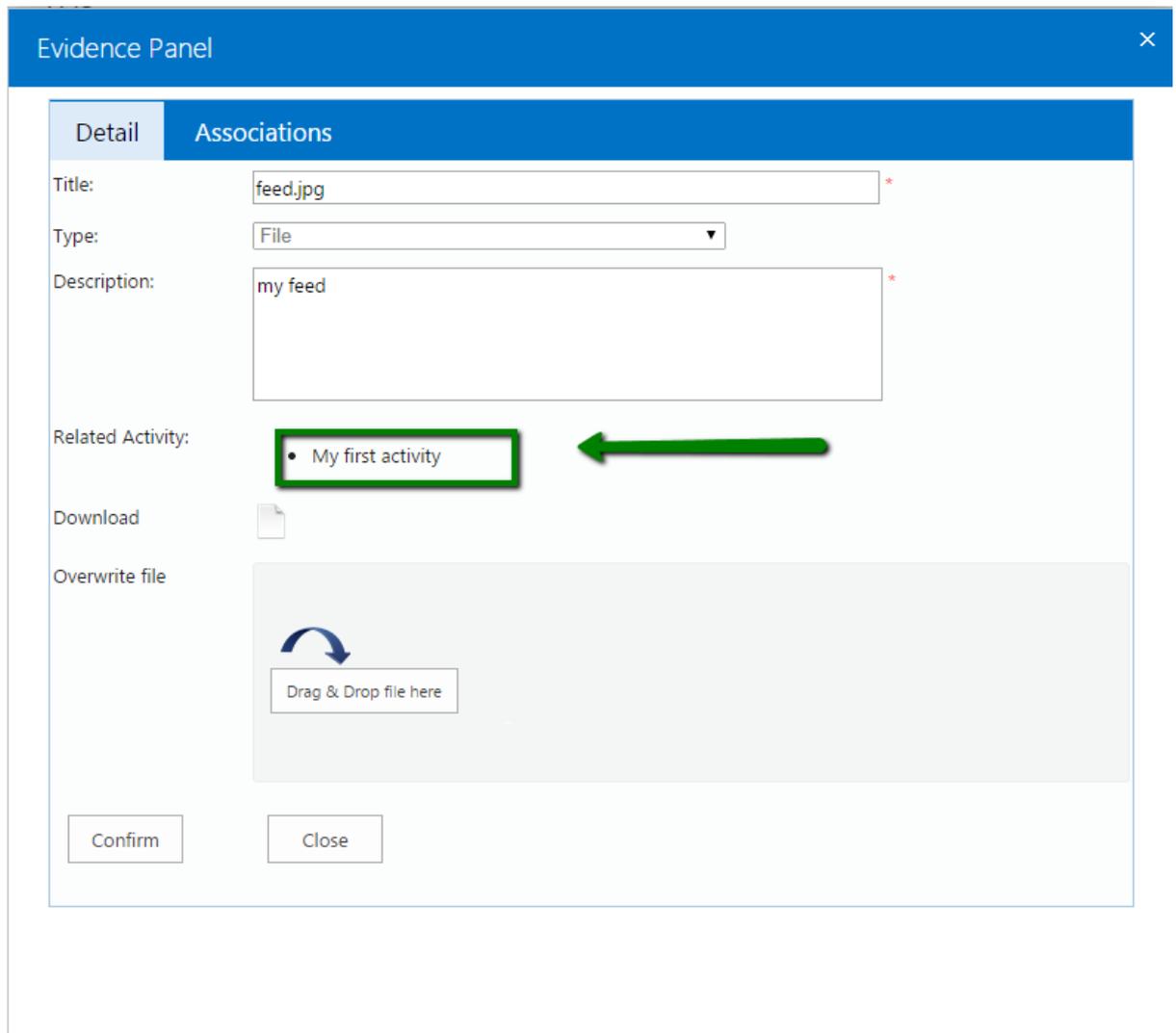
**My Evidence list**

Show  entries Search:

Evidence Name	Type	Date Added	Is Locked
feed.jpg	File	28/01/2015 14:22:21	No
<input type="button" value="Edit Item"/> <input type="button" value="View Item"/> <input type="button" value="Delete item"/> <input type="button" value="Close"/>			
Brixton.png	File	28/01/2015 13:46:31	No

Showing 1 to 2 of 2 entries Previous  Next

2. Be sure the current Evidence is related at least to an activity by looking at the “Related activity” section

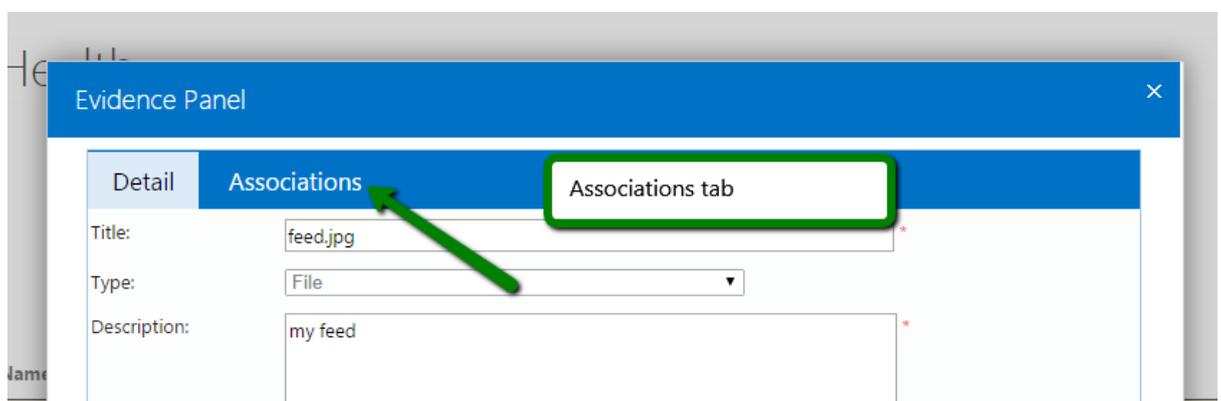


The screenshot shows the 'Evidence Panel' modal window with the 'Associations' tab selected. The form contains the following fields:

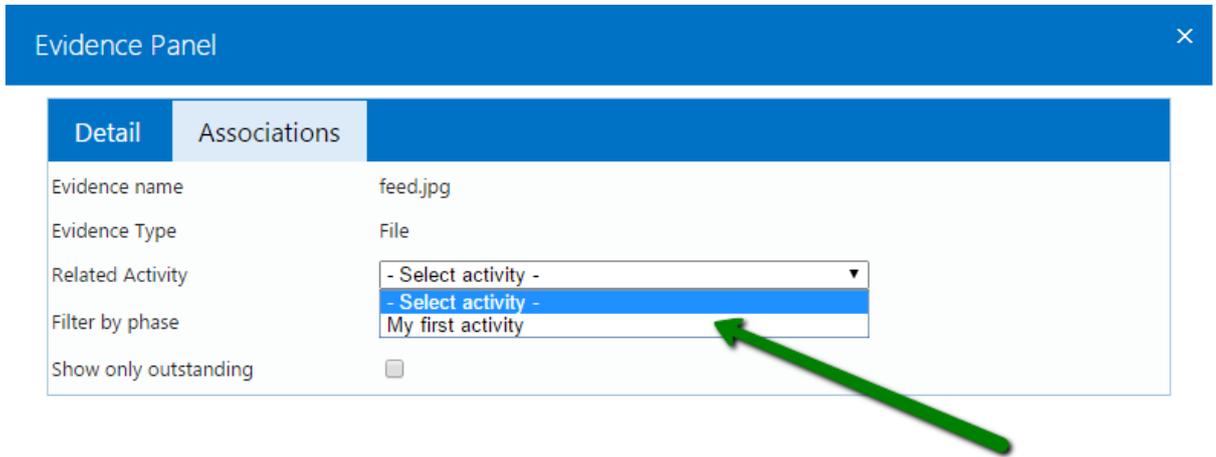
- Title:** feed.jpg
- Type:** File
- Description:** my feed
- Related Activity:** My first activity (highlighted with a green box and a green arrow pointing to it from the right)
- Download:** A document icon.
- Overwrite file:** A grey area with a circular arrow icon and the text 'Drag & Drop file here'.

At the bottom of the modal are two buttons: 'Confirm' and 'Close'.

3. Click the “**Association tab**” in the top of the modal window.



4. In the “Related Activity” dropdown select the activity you want to take in consideration for the creation of the relations with the Learning Outcomes



The screenshot shows a software interface titled "Evidence Panel" with a close button (X) in the top right corner. Below the title bar are two tabs: "Detail" and "Associations". The "Associations" tab is active. The interface displays the following information:

Evidence name	feed.jpg
Evidence Type	File
Related Activity	- Select activity - - Select activity - My first activity
Filter by phase	
Show only outstanding	<input type="checkbox"/>

A green arrow points to the "My first activity" option in the dropdown menu.

5. The “Associations tab” now lists all the Learning Outcomes that can be linked to the association between the Evidence “feed.jpg” and the Activity “My first activity”.

Evidence Panel ×

Detail	Associations
Evidence name	feed.jpg
Evidence Type	File
Related Activity	<input style="width: 100%;" type="text" value="My first activity"/>
Filter by phase	<input style="width: 100%;" type="text" value="- All phases -"/>
Show only outstanding	<input type="checkbox"/>
<a href="#">Expand all</a> <a href="#">Collapse all</a> <div style="float: right; border: 1px solid #ccc; padding: 2px 5px; margin-top: 5px;">Filter...</div>	
+ EMS:EMS	
+ KA1:Surveillance and assessment	
+ KA2:Assessing the evidence of effectiveness	
+ KA3:Policy and strategy development and implementation	
+ KA4:Strategic leadership and collaborative working for health	
+ KA5:Health Improvement	
+ KA6:Health Protection	
+ KA7:Health and social service quality	
+ KA8:Public health intelligence	
+ KA9:Academic public health	
<input style="margin-right: 20px;" type="button" value="Save"/> <input type="button" value="Close"/>	

- Expand single or multiple categories of Learning Outcomes by using the “+” icons on the left side or expand all by using the “Expand all” link



- Tick the checkboxes for the Learning outcomes you want to assign and provide a valid comment for the one ticked then Click “**Save**” at the bottom of the page. If the process is successfully completed you will be redirected back to the “Evidence Dashboard” page.

**EMS1.1: Recognise and work within professional competence (Phase 2)**

**EMS1.1: Recognise and work within professional competence (Phase 3)**

**EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 1)**

**EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 2)**

**EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 3)**

**EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 1)**

**EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 2)**

**EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 3)**

**EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1)**

**KA5:Health Improvement**

**KA6:Health Protection**

**KA7:Health and social service quality**

**KA8:Public health intelligence**

**KA9:Academic public health**

8. By repeating all the steps in this process it is possible at any time to edit these relations, as well as update the description provided or remove an association by un-ticking the box related to a LO and then saving using the "Save" button

**EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 1)**

+ KA5:Health Improvement
+ KA6:Health Protection
+ KA7:Health and social service quality
+ KA8:Public health intelligence
+ KA9:Academic public health

Save    Close



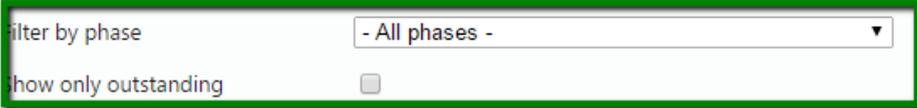
### Filtering Learning outcomes

- The “Filter by phase” allows you to filter the Learning outcomes by phase. By setting “Phase 1” in the dropdown for instance the only Learning outcomes shown will be obviously the one related to the “Phase 1” excluding the one only included in “Phase 2” or “Phase 3”
- The “Show only outstanding” checkbox, if ticked, will show only the Learning outcomes which don’t have a related “Learning Outcome Sign-Off Sheet” (LOSOS) yet.
- The “Search box” allows you to filter the tree-view list

Evidence name	feed.jpg
Evidence Type	File
Related Activity	My first activity
Filter by phase	- All phases -
Show only outstanding	<input type="checkbox"/>

[Expand all](#)    [Collapse all](#)

Filter...



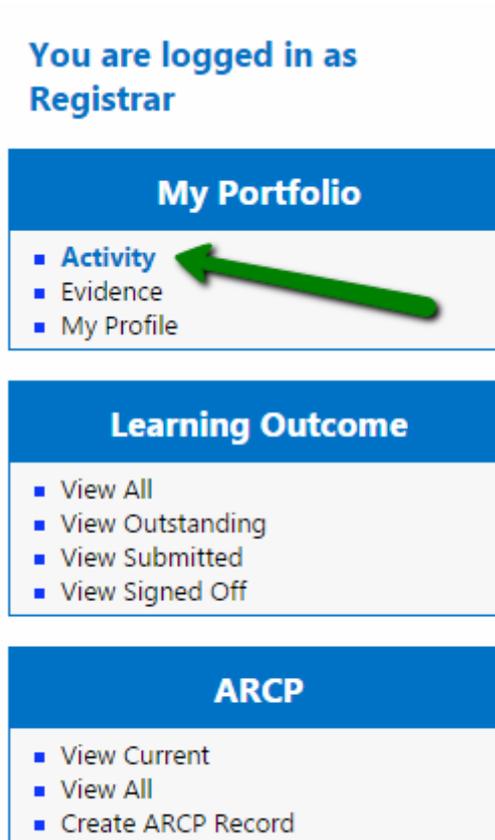


## Adding and Managing Activities

---

### Access the “Activity General Dashboard”

1. Go to My Portfolio -> Activity. Click “Activity”



2. The page shown summarises in a grid all the activities inserted by your user into the system with the all the functionalities of sorting/filtering/searching of the “Evidence General Dashboard”.

Please notice that some of the activities in the list could have “Migrated Evidence “as type. This special type of Activity has been generated in the new system to maintain consistency among the Learning outcomes’ relations with the old migrated system

### Activity General Dashboard

My Activities

[Add new Activity](#)

Show  entries

Search:

Activity Name	Type	Status	Created	Is Locked
My first activity	Activity summary sheet	Open	28/01/2015 16:29:04	No

Showing 1 to 1 of 1 entries

Previous  Next

## Add a new Activity

1. Access the "Activity General Dashboard". Click "Add new Activity"

### Activity General Dashboard

My Activities

[Add new Activity](#)

Show  entries

Activity Name	Type
My first activity	Activity summary sheet

Showing 1 to 1 of 1 entries

2. Use the dropdown "Select region" to select the region of the "Activity Supervisor". A dropdown will appear allowing you to select one of the supervisors related to that particular region

### Activity Item

Activity Type:

Activity name:

### Activity Item

Activity Supervisor:  \*

Activity Type:

Activity name:  \*

**Activity summary section**

Results:

- Use the “Activity Type” dropdown to select the type of Activity you want to insert by choosing between the “Activity Summary sheet” and “Pre Planning Activity” options. The fields that can be populated vary according to the kind of Activity that is going to be created

### Activity Item

Select region to select Activity Supervisor:  \*

Activity Type:

Activity name:  \*

**Activity summary section**

Results:

Pre planning activity form

Select region to select Activity Supervisor:  ▼ \*

Activity Type:  ▼

Activity name:

**Pre-Activity Planning section**

Background:

Aims & Objectives:

Personal contribution/roles & responsibilities:

Involvement of others:

Outcome:

Backing literature:

Possible Publication:

Activity summary sheet

Select region to select Activity Supervisor:  ▼ \*

Activity Type:  ▼

Activity name:

**Activity summary section**

Results:

Training Location:

Activity completed:

Personal Reflection:

- Complete the form providing at least a valid activity name (not blank) and a valid activity supervisor (not blank) to be able to submit the form without error.

Click “Save and Close” or alternatively “Save and link to Evidence/LO” if you want to create relations to Evidence and Learning Outcomes at this stage.

Buttons: Save and Close, Save and link to Evidence/LO, Go back to Activity Dashboard

Select region to select Activity Supervisor: London

Activity Type: Activity summary sheet

Activity name: My activity

**Activity summary section**

Results: my results

Training Location: my training location

Activity completed: [calendar]

Personal Reflection: [text area]

- The system now redirects you to the “Activity General Dashboard” where you can notice the activity just inserted and where you can eventually view, edit, delete or submit the activity by clicking on the related row in the grid

**Activity General Dashboard**

My Activities

Add new Activity

Show 10 entries

Search: [input]

Activity Name	Type	Status	Created	Is Locked
My first activity	Activity summary sheet	Open	28/01/2015 16:29:04	No
My activity	Activity summary sheet	Open	29/01/2015 11:12:59	No

Showing 1 to 2 of 2 entries

Previous 1 Next

## Create/Edit relations with Evidence and Learning Outcomes

1. Go to the “Activity General Dashboard”. Click on the row in the grid of the activity you want to create/edit relations (only not “locked” activities allow you to edit their relations). Click “Edit item”.

**Activity General Dashboard**

My Activities  
Add new Activity  
Show 10 entries

Search:

Activity Name	Type	Status	Created	Is Locked
My first activity	Activity summary sheet	Open	28/01/2015 16:29:04	No
My activity	Activity summary sheet	Open	29/01/2015 11:12:59	No

Showing 1 to 2 of 2 entries

Previous 1 Next

2. Click “Save and Link to Evidence/LO”

**Activity Item**

Save and Close    **Save and link to Evidence/LO**    Go back to Activity Dashboard

Activity Supervisor:  \*

Activity Type:

Status:

Activity name:  \*

**Activity summary section**

Results:

Training Location:

Activity completed:

Personal Reflection:

**Supervisor Section**

Review Date:

Supervisor Reflection:

- The “Activity relations page” now shows in the upper part a list of Evidence (if any) and underneath the Evidence grid it shows a list of Learning Outcomes grouped by category in the same tree view list described in the [“Create/Edit relations with Learning Outcomes”](#) process in the Evidence section of this document.

#### Activity relations page

##### My first activity

**Associated Evidence**

Show  entries Search:

Evidence Name	Type	Date Added
feed.jpg	File	28/01/2015 14:22:21

Showing 1 to 1 of 1 entries Previous  Next

**Associated Learning Outcome**

Filter by phase

Show only outstanding

[Expand all](#) [Collapse all](#)

- + EMS:EMS
- + KA1:Surveillance and assessment
- + KA2:Assessing the evidence of effectiveness
- + KA3:Policy and strategy development and implementation
- + KA4:Strategic leadership and collaborative working for health
- + KA5:Health Improvement
- + KA6:Health Protection
- + KA7:Health and social service quality
- + KA8:Public health intelligence
- + KA9:Academic public health

- Click “Link existing Evidence”

**Evidence Name**

feed.jpg
----------

Showing 1 to 1 of 1 entries

**Associated Learning Outcome**



- In the modal window the evidence included in the left box lists all the available evidence to eventually associate to the Activity while the box on the right shows all the Evidence currently associated to the Activity.

Link existing Evidence

**This is the modal window to link activity to evidences**

**All Evidence:** Brixton.png

**Current Evidence for this Activity:** feed.jpg

Include

>

<

Exclude

Confirmation button

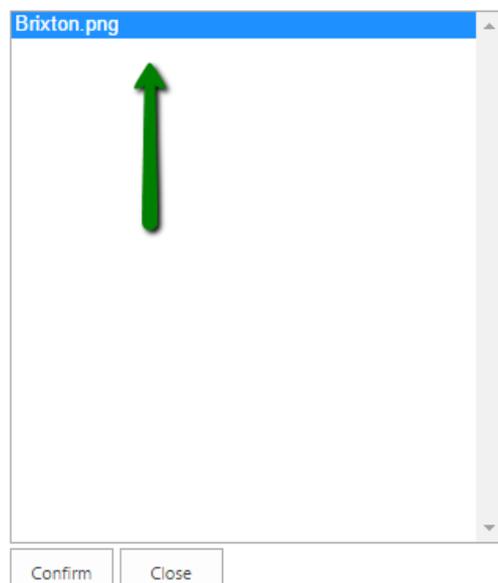
Confirm Close

- To associate a not already associated Evidence to the current Activity Click on the name of the Evidence and then Click ">". The Evidence will move from the left to the right box. The same process can be used to remove a relation to an Evidence by selecting one or more Evidence in the right box ("Current Evidence for this Activity") and using the "Exclude" button to move it to the left box.

## Link existing Evidence

This is the modal window to link activity to evidences

All Evidence:



Current Evidence for this Activity:

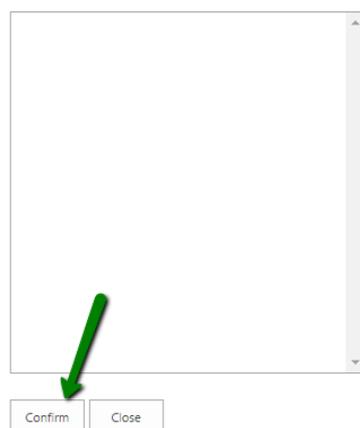


7. Click "Confirm"

## Link existing Evidence

This is the modal window to link activity to evidences

All Evidence:



Current Evidence for this Activity:



- The Evidence has now been associated.

#### Activity relations page

##### My first activity

###### Associated Evidence

Show 10 entries

Search:

Evidence Name	Type	Date Added
feed.jpg	File	28/01/2015 14:22:21
Brixton.png	File	28/01/2015 13:46:31

Showing 1 to 2 of 2 entries

Previous 1 Next

[Link existing Evidence](#)

It is very important to understand that a very important feature of the system is the inheritance of relations. It means that all the previous relations with learning outcomes via other activities for the Evidence just associated become part of the relations for the current activity.

To edit or remove the existing relations, imported with the Evidence, just select or edit the Learning Outcomes in the lower part of the page as described in [the “Create/Edit relations with Learning Outcomes”](#) process in the Evidence section of this document.

## Submit an Activity

- In the “Activity General Dashboard” Click the row related to the specific Activity you want to submit to the Activity Supervisor

My Activities

[Add new Activity](#)

Show 10 entries

Search:

Activity Name	Type	Status	Created	Is Locked
My first activity	Activity summary sheet	Open	28/01/2015 16:29:04	No
My activity	Activity summary sheet	Open	29/01/2015 11:12:59	No

Showing 1 to 2 of 2 entries

Previous 1 Next

- Confirm the submission by clicking “**Submit**” in the modal window that is shown. As displayed in the window, all the associations with evidence and Learning Outcomes become locked (no possibility to associate more Evidence to the Activity) as well as all the related Evidence (no possibility to edit the single Evidence item if locked) and the Activity (no possibility to edit the Activity fields).  
Once submitted, the Activity becomes reviewable by the “Activity Supervisor” related to it.

ie 11-

Submit Activity ×

Activity Name:

**Do you want to submit this Activity?**

**All the associations with Learning Outcomes and Evidence will be locked**

ated  
15 16



## Learning Outcomes

The “Learning Outcome” section in the left bar menu has 4 different links:

1. View All
2. View Outstanding
3. View Submitted
4. View Signed-Off

No matter which link button is clicked, the page where you will be redirected will be the “Learning Outcome Dashboard”

The difference in the result page consist on the kind of filtering applied to the results.

### View All

Shows all the Learning Outcomes grouped in categories including the ones which LOSOS hasn't been submitted yet.

### View Outstanding

Shows only the Learning Outcomes which have a related LOSOS in “Under review” status

### View Submitted

Shows only the Learning Outcomes which have a related LOSOS in “In Progress” status

### View Signed-Off

Shows only the Learning Outcomes which have a related LOSOS in “Approved” status

#### Learning Outcomes Dashboard

Filter by phase

- All phases -

Show only outstanding



Expand all Collapse all

Filter...

+ EMS1.1: Recognise and work within professional competence (Phase 1) (0 activities)	
+ EMS1.1: Recognise and work within professional competence (Phase 2) (0 activities)	
+ EMS1.1: Recognise and work within professional competence (Phase 3) (0 activities)	
+ EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 1) (0 activities)	
+ EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 2) (0 activities)	
+ EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 3) (0 activities)	
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 1) (0 activities)	
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 2) (0 activities)	
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 3) (0 activities)	
+ EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1) (1 activity)	Submit LOSOS
+ EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 2) (0 activities)	
+ EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 3) (0 activities)	
+ EMS1.13: Keep knowledge and skills up to date, including regular audit, appraisal and reflective learning (Phase 1) (0 activities)	
+ EMS1.13: Keep knowledge and skills up to date, including regular audit, appraisal and reflective learning (Phase 2) (0 activities)	
+ EMS1.13: Keep knowledge and skills up to date, including regular audit, appraisal and reflective learning (Phase 3) (0 activities)	
+ EMS1.14: Practise safely including assuring professional indemnity, safeguarding the public from others' unsafe practice, (Phase 1) (0 activities)	
+ EMS1.14: Practise safely including assuring professional indemnity, safeguarding the public from others' unsafe practice, (Phase 2) (0 activities)	

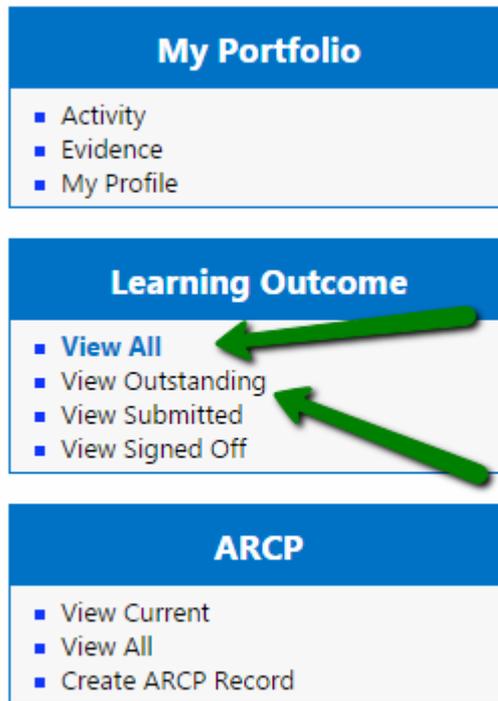
In the top area the filtering section allow you to filter the Learning Outcomes in the same way as describes in the [“Filtering Learning outcomes”](#) process

---

## Learning Outcome Sign-off Sheet (LOSOS)

### Submit a LOSOS

1. Go to the “Learning Outcome Dashboard” as shown in the previous section by clicking “View All” or “View Outstanding” in the “Learning Outcome” section.



2. The LOSOS that can be submitted are the ones related to Learning Outcomes with at least one associated Activity. You can check this by looking at the activities counted on the right side of the learning outcome title and expanding a specific node of the tree-view list to show the activities related to the Lo and the evidence related to each activity.

+ EMS1.10: Respect skills and contributions of colleagues and maintain professional relationships (Phase 3) (0 activities)			
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 1) (0 activities)			
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 2) (0 activities)			
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 3) (0 activities)		Activity count	Action link
- EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1) (1 activity)			Submit LOSOS
- My first activity (2 evidence)			
Evidence name	Evidence related	Type	Date added
feed.jpg		File	28/01/2015
Bnixon.png		File	28/01/2015

3. Click **“Submit LOSOS”** being sure to have created in advance an ARCP item (explained in the next “ARCP” section of this document) and that the phase is set in your “My Profile” section.

Error on submission

LOSOS
×

### Submit Losos

**EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1)**

ARCP: There are no available Open ARCPs. You cannot submit this LOSOS. Please create an ARCP item first.

Current Trainee Phase: Current Phase not set in the User Profile: on Losos submission the default phase will be 'Phase 1'

Phase:

Status:

Educational Supervisor:

Educational Supervisor comments:

Review date:

Rejection reason:

Phase and ARCP correctly set

LOSOS
×

### Submit Losos

**EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1)**

ARCP:

Current Trainee Phase:

Phase:

Educational Supervisor:

- Select one of the ARCP items option in the “ARCP” dropdown and the submission phase in the “Phase” dropdown (for Learning Outcomes that spans across multiple phases this dropdown shows multiple options). Click “**Save and Close**”.

The submitted LOSOS will be now viewable by clicking “View Submitted LOSOS” that now appears in the dashboard for that specific Learning Outcome.

Please note that the submission of a LOSOS for a Learning Outcome locks in cascade all the related activities and all the evidence related to each activity

**Note: The method of assessment tick-boxes can only be populated by your ES.**

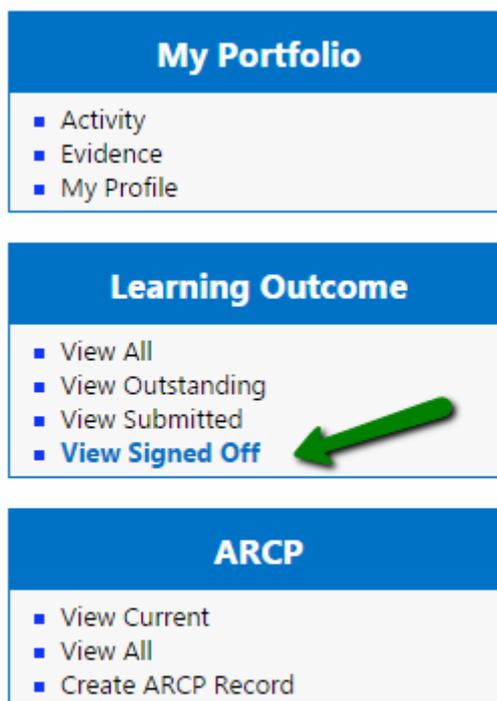
• EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 2) (0 activities)	
+ EMS1.11: Be readily accessible to the public and colleagues when on duty including (Phase 3) (0 activities)	
+ EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1) (1 activity)	<a href="#">View submitted LOSOS</a>
+ EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 2) (0 activities)	

## View Losos

ARCP:	<input type="text" value="1"/>
Current Trainee Phase:	<input type="text" value="Phase 1"/>
Phase:	<input type="text" value="Phase 1"/>
Status:	<input type="text" value="In Progress"/>
Educational Supervisor:	<input type="text" value="Andrea Julie Atherton"/>
Educational Supervisor comments:	<input type="text"/>
Method of assessment:	<input type="checkbox"/> Direct observation <input type="checkbox"/> Case discussion <input type="checkbox"/> Written report <input type="checkbox"/> Multi-source feedback <input type="checkbox"/> Written Exam (Part A) <input type="checkbox"/> OSPHE (Part B)
Review date:	<input type="text"/>
<input type="button" value="Close"/>	

## View Approved LOSOS

1. The fastest way to view an approved LOSOS is to access the “Learning Outcomes Dashboard” via “Via Signed Off” link.



2. Click “View submitted LOSOS”



3. View the LOSOS form (read-only fields) with the fields populated by the Educational Supervisor

## View Losos

ARCP:	1
Current Trainee Phase:	Phase 1
Phase:	Phase 1
Status:	Approved
Educational Supervisor:	Andrea Julie Atherton
Educational Supervisor comments:	My approval comments
Method of assessment:	<input checked="" type="checkbox"/> Direct observation <input type="checkbox"/> Case discussion <input checked="" type="checkbox"/> Written report <input type="checkbox"/> Multi-source feedback <input type="checkbox"/> Written Exam (Part A) <input type="checkbox"/> OSPHE (Part B)
Review date:	16/01/2015

Close

Educational supervisor section

## Creating and Managing ARCPs

---

### Create an ARCP record

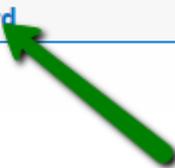
1. Go to "ARCP"-> "Create ARCP Record". Click "Create ARCP Record".

**You are logged in as  
Registrar**

<b>My Portfolio</b>
<ul style="list-style-type: none"><li>■ Activity</li><li>■ Evidence</li><li>■ My Profile</li></ul>

<b>Learning Outcome</b>
<ul style="list-style-type: none"><li>■ View All</li><li>■ View Outstanding</li><li>■ View Submitted</li><li>■ View Signed Off</li></ul>

<b>ARCP</b>
<ul style="list-style-type: none"><li>■ View Current</li><li>■ View All</li><li>■ <b>Create ARCP Record</b></li></ul>



2. Complete the form (at least the mandatory fields). Click "Save and Close"

## Create ARCP Record

ARCP Date:  \*

Additional Details:

From Date:  \*

Please note that the Cut Off date will be 2 weeks prior to the ARCP Date

Cut-off Date:

**Mandatory fields**

## Access the ARCP General Dashboard

1. Go to ARCP-> "View All". Click "View All"

**My Portfolio**

- Activity
- Evidence
- My Profile

**Learning Outcome**

- View All
- View Outstanding
- View Submitted
- View Signed Off

**ARCP**

- View Current
- **View All**
- Create ARCP Record

- The grid in the “ARCP General Dashboard” page will show all the “ARCP record” items giving the possibility to click each row showing a sub-menu where it is possible to select the “View Item” button to be redirected to the particular item detail page.

#### ARCP General Dashboard

##### My Arcp list

Show 10 entries

Arcp Number	Status	From Date	Cut-off Date
1	Open	10/01/2015 00:00:00	01/01/0001 00:00:00
2	Open	10/01/2015 00:00:00	01/01/0001 00:00:00
3	Open	10/01/2015 00:00:00	01/01/0001 00:00:00
4	Open	03/01/2015 00:00:00	27/12/2014 00:00:00
5	Open	17/01/2015 00:00:00	03/01/2015 00:00:00

Showing 1 to 5 of 5 entries

### Access to an Existing ARCP record item

- Go to the “ARCP General Dashboard” then Click “**View item**” or Click “**View Current**” in the “ARCP” section in the left bar menu to be redirected to the ARCP item page.

This page contains:

- the “Details” section of the ARCP (“ARCP Date”, “Additional details”, “From date”, “Cut-off date” and “Status” fields)
- the “Associated reports” section where you can Submit/Finalise/Update/View reports (ESR, ASR and LAF)
- the “Personal documents” section where you can upload forms (Form 4 and Form R) and CVs in forms of files
- the “Associated Learning Outcomes” section with the usual tree-view list of LO-Activity-Evidence with the possibility to view the particular LOSOS associated by clicking the “**View submitted LOSOS**” link

## View ARCP

ARCP date:

Additional details:

From date:

Cut-off date:

Status:

## Associated reports

<b>Educational Supervisor report:</b>	<input type="button" value="Submit ESR"/>
<b>Academic Supervisor report:</b>	<input type="button" value="Submit ASR"/>
<b>Learning Agreement Form:</b>	<input type="button" value="Submit LAF"/>

## Personal documents

<b>Curriculum Vitae:</b>	<input type="button" value="Choose file"/> No file chosen
<b>Form R:</b>	<input type="button" value="Choose file"/> No file chosen
<b>Form 4</b>	<input type="button" value="Choose file"/> No file chosen

## Associated Learning Outcomes

Filter by phase:

- EMS1.12: Pay regard to efficiency while not discriminating against individuals/populations (Phase 1) (1 activity)			<a href="#">View submitted LOSOS</a>
- My first activity (2 evidence)			
Evidence name	Type	Date added	
feed.jpg	File	28/01/2015	
Brixton.png	File	28/01/2015	

## Upload personal documents

- Go to "View ARCP" items as shown in the "Access to an Existing ARCP record item" process. Use the "Choose file" buttons to select the files you want to upload

## Personal documents

<b>Curriculum Vitae:</b>	<input type="button" value="Choose file"/> No file chosen
<b>Form R:</b>	<input type="button" value="Choose file"/> No file chosen
<b>Form 4</b>	<input type="button" value="Choose file"/> No file chosen

2. When at least one of the 3 files has been selected Click **“Upload”**

#### Personal documents

Curriculum Vitae:	Choose file	Additional_Options.odt
Form R:	Choose file	collapsed.png
Form 4	Choose file	No file chosen

3. When the process is complete you will be able to see the clickable name of the uploaded file/files on the right of the “Choose file” button.  
If needed the “Remove” button allows you to remove the file and by clicking on the filename you are able to download the file on your local computer

#### Personal documents

Curriculum Vitae:	Choose file	No file chosen	Additional_Options.odt (29/01/2015)	<input type="button" value="Remove"/>
-------------------	-------------	----------------	-------------------------------------	---------------------------------------

4. If you want to upload another version of any of the documents by keeping the previous one just upload another file without removing the old one. You will be able to view all the versions of the file ordered chronologically with a date on the title

Curriculum Vitae:	Choose file	No file chosen	lock_unlock.odp (29/01/2015)	<input type="button" value="Remove"/>
			Additional_Options.odt (29/01/2015)	<input type="button" value="Remove"/>

5. In the particular case of the “Curriculum vitae” file if you Go to the “My Profile” you will find the latest version of your uploaded CV at the bottom of the page

Work Address Region:	<input type="text"/>
Work Address City:	<input type="text"/>
Work Address Country:	<input type="text"/>
Work Address Postcode:	<input type="text"/>
Workplace:	<input type="text"/>
NTN:	<input type="text"/>
Current Phase:	Phase 1 ▼
FPH ID:	<input type="text"/>
Educational Supervisor region:	East of England ▼
Educational Supervisor:	Andrea Julie Atherton 
Training Programme Director region:	FPH ▼
Training Programme Director:	tpd 
Latest CV:	lock_unlock.odp (29/01/2015)



## Educational Supervisor Report

### Initiate Educational Supervisor Report (ESR)

1. Go to the “View ARCP” item page as described in the “**Access to an Existing ARCP record item**” process. If no ESR has been already initiated by an Educational Supervisor the button shown in the “Associated Supervisor report” section will be “Submit ESR”. Click “**Submit ESR**”

### Associated reports

<b>Educational Supervisor report:</b>	<input type="button" value="Submit ESR"/>
<b>Academic Supervisor report:</b>	<input type="button" value="Submit ASR"/>
<b>Learning Agreement Form:</b>	<input type="button" value="Submit LAF"/>



2. Complete all the fields the form (the “Educational supervisor” field is not editable and is set to the current one set in the “My Profile” section and to be changed it needs to be updated from there). Click “**Submit ESR**”

Educational Supervisor Report ×

Current Educational Supervisor:	<input type="text" value="Andrea Julie Atherton"/>
PMETB Programme/Post Approval Number:	<input type="text"/> *
GMC:	<input type="text"/> *
NTN:	<input type="text"/> *
Placement:	<input type="text" value="Year 1"/>
<input type="button" value="Submit ESR"/>	

3. If the process is successfully complete the “Associated Reports” section will show the “View ESR” button instead. Click “**View ESR**”.

## Associated reports

**Educational Supervisor report:**

View ESR



- The ESR Report form is in read only now and shows an “Under Review” status. The related Educational Supervisor can now on his side approve or reject the report.

Educational Supervisor Report ×

Educational Supervisor who initiated this report:	<input type="text" value="Andrea Julie Atherton"/>
PMETB Programme/Post Approval Number:	<input type="text" value="PTB number"/>
GMC:	<input type="text" value="gmc"/>
NTN:	<input type="text" value="ntn"/>
Placement:	<input style="border-bottom: 1px solid black;" type="text" value="Year 2"/>
Status:	<input type="text" value="Under Review"/>

### Finalise ESR

- In case the Educational supervisor has initiated or rejected the ESR, go to “Associated report section” and Click “Finalise ESR”

## Associated reports

**Educational Supervisor report:**

Finalise ESR



**Academic Supervisor report:**

Submit ASR

**Learning Agreement Form:**

Submit LAF

- Complete the form with valid data, then Click “Submit” to re-submit the ESR to the Educational Supervisor

Educational Supervisor Report
×

PMETB Programme/Post Approval Number:	PTB number	*
GMC:	gmc	*
NTN:	ntn	*
Placement:	Year 2	▼
Status:	Rejected	
Rejection Reason:	This is my rejection description	

### View Approved ESR

1. In case of approved ESR the form is only viewable in read-only mode. Go to the “Associated reports” section then Click “View ESR”

Educational Supervisor Report
×

Educational Supervisor who initiated this report:	Andrea Julie Atherton	
PMETB Programme/Post Approval Number:	PTB number	
GMC:	gmc	
NTN:	ntn	
Placement:	Year 2	▼
Status:	Approved	
Review Date:	30/01/2015	
Areas for Improvement:	some test	
Complaints Comment:	some test	
Complaints Outcome:	some test	
Complaints Date:	04/01/2015	
Other Comment:	some test	

## Academic Supervisor Report (ASR)

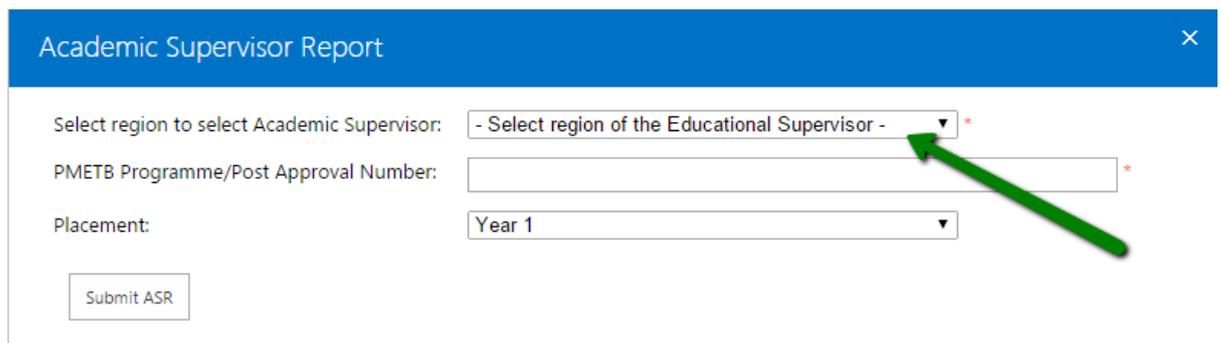
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### Submit Academic Supervisor Report (ASR)

1. Go to the “View ARCP” item page as described in the “**Access to an Existing ARCP record item**” process. If the report has not been already initiated Click “**Submit ASR**”



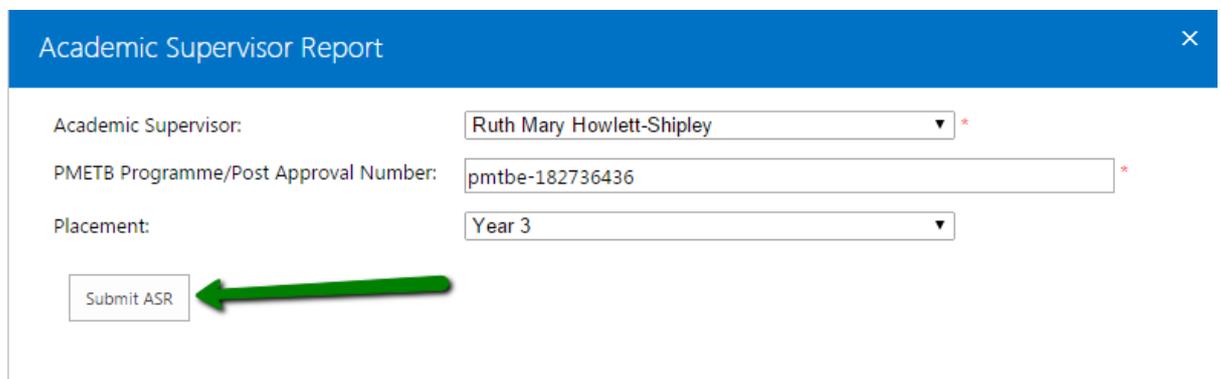
2. Select the region of the Academic Supervisor you want to associate to the report, then Select the Academic Supervisor in the dropdown that appears after the selection of the region. Complete the form then Click “**Submit ASR**”



A screenshot of a form titled "Academic Supervisor Report" with a blue header and a close button (X) in the top right. The form contains the following fields:

- Select region to select Academic Supervisor: - Select region of the Educational Supervisor - (dropdown menu) \*
- PMETB Programme/Post Approval Number: (text input) \*
- Placement: Year 1 (dropdown menu)

A "Submit ASR" button is located at the bottom left. A thick green arrow points to the region dropdown menu.

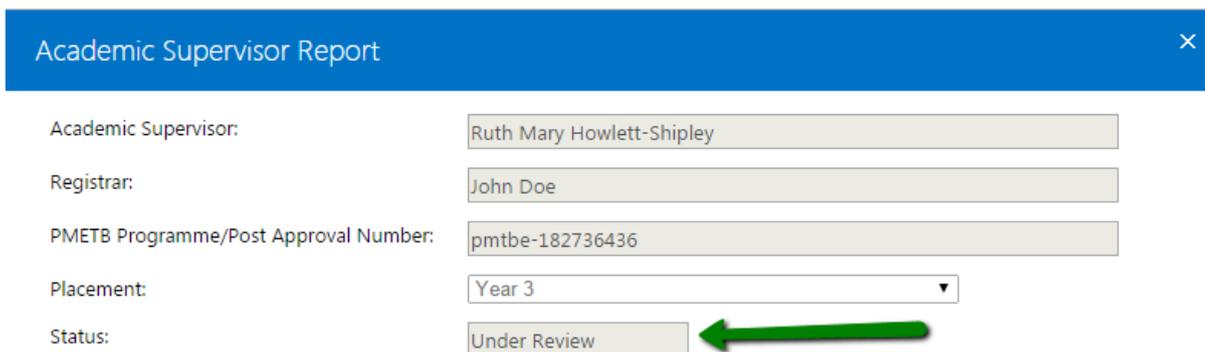
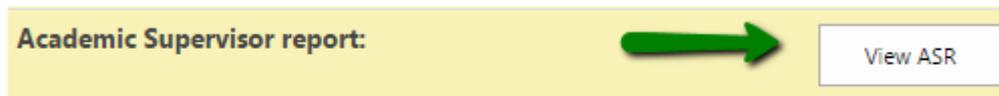


A screenshot of a form titled "Academic Supervisor Report" with a blue header and a close button (X) in the top right. The form contains the following fields:

- Academic Supervisor: Ruth Mary Howlett-Shipley (dropdown menu) \*
- PMETB Programme/Post Approval Number: pmtbe-182736436 (text input) \*
- Placement: Year 3 (dropdown menu)

A "Submit ASR" button is located at the bottom left. A thick green arrow points to the "Submit ASR" button.

3. The ASR has now been submitted (it is in “Under Review” status) to the supervisor and can be accessed in “view mode”

A blue header bar with the text "Academic Supervisor Report" and a close icon (X) on the right. Below the header is a form with the following fields:

Academic Supervisor:	Ruth Mary Howlett-Shipley
Registrar:	John Doe
PMETB Programme/Post Approval Number:	pmtbe-182736436
Placement:	Year 3
Status:	Under Review

A green arrow points from the "Under Review" status field to the left.

### Update ASR if Rejected

1. If the ASR is rejected by the Academic supervisor the button shown in the “Associated reports” section of the ARCP item is “Update ASR”. Click “Update ASR”



2. Update the fields in the form eventually changing the Academic Supervisor then Click “Update ASR” at the bottom of the page

## Academic Supervisor Report

Academic Supervisor:	<input type="text" value="Ruth Mary Howlett-Shipley"/> *
Registrar:	<input type="text" value="John Doe"/>
PMETB Programme/Post Approval Number:	<input type="text" value="pmtbe-182736436"/> *
Placement:	<input type="text" value="Year 3"/>
Status:	<input type="text" value="Rejected"/>
Review Date:	<input type="text"/>
Areas for Improvement:	<input type="text"/>
Recommendations:	<input type="text"/>
Strengths:	<input type="text"/>
Supervisor Comment:	<input type="text"/>

Rejection Reason:



- The ASR has now been re-submitted and is viewable in view mode (it is in “Under review” status)

Academic Supervisor Report ×

Academic Supervisor:	<input type="text" value="Ruth Mary Howlett-Shiple"/>
Registrar:	<input type="text" value="John Doe"/>
PMETB Programme/Post Approval Number:	<input type="text" value="new-pmtbe-182736436"/>
Placement:	<input type="text" value="Year 3"/>
Status:	<input type="text" value="Under Review"/>

### View Approved ASR

- In case of approved ASR the form is only viewable in read-only mode. Go to the “Associated reports” section then Click **“View ASR”**

Academic Supervisor Report

Academic Supervisor:	<input type="text" value="Ruth Mary Howlett-Shiple"/>
Registrar:	<input type="text" value="John Doe"/>
PMETB Programme/Post Approval Number:	<input type="text" value="new-pmtbe-182736436"/>
Placement:	<input type="text" value="Year 3"/>
Status:	<input type="text" value="Approved"/>
Review Date:	<input type="text" value="31/01/2015"/>
Areas for Improvement:	<input type="text" value="some text"/>
Recommendations:	<input type="text" value="some text"/>
Strengths:	<input type="text" value="some text"/>
Supervisor Comment:	<input type="text" value="some text"/>

## Learning Agreement Form (LAF)

---

### Submit Academic Supervisor Report (LAF)

1. Go to the “View ARCP” item page as described in the “**Access to an Existing ARCP record item**” process. If the report has not been already initiated Click “**Submit LAF**”



This report needs to be approved by two assessors (the Educational Supervisor and the Training Programme Director) and in case one of these two actors rejects the form, it is sent back for update.

2. Complete all the fields in the form then Click “**Submit LAF**” at the bottom of the page (the ES and TPD are set as the ones in your “My Profile” section and cannot be updated on this form)

Learning Agreement Form ×

Educational Supervisor:

Training Programme Director:

Plan Duration:

Placement:

Review Date:

Educational objectives identified plan:

Educational objectives identified detail:

Exam milestones plan:

Exam milestones detail:

Placement move discussion plan:

Placement move discussion detail:

Submit LAF

### Update a LAF (if rejected)

1. If the LAF is rejected by the Academic supervisor the button shown in the “Associated reports” section of the ARCP item is **“Update LAF”**. Click **“Update LAF”**



2. Complete the fields in the form and Click **“Update LAF”** at the bottom of the page. You can find the reasons of the rejection in the field “Rejection Reason” placed just before the button.

Training Programme Director comments:

Rejection Reason:

Rejected!

Update LAF

### View Approved LAF

1. In case of approved LAF (by both of the assessors) the form is only viewable in read-only mode. Go to the “Associated reports” section then Click **“View LAF”**



First Assessor:	Andrea Julie Atherton
Second Assessor:	tpd
Registrar:	John Doe
Plan Duration:	6 months ▼
Placement:	Year 2 ▼
Status:	Approved
Review Date:	02/01/2015
Educational objectives identified plan:	test
Educational objectives identified detail:	test
Placement move discussion plan:	test
Placement move discussion detail:	test
Training Programme Director comments:	This has been approved!