



Changes to ePortfolio Review Structure – Notes for Deanery Administrators

Introduction

When we are talking about a change to the ePortfolio review structure, we are not talking about a change to the number of reviews required each year, or the evidence requirements of these. What we are talking about is a change to the labelling of the reviews within the ePortfolio.

Why the change?

Currently within the ePortfolio, the choices when creating a review or viewing evidence, appear as a very long list. Each review type in the list follows the one before it.

For a full time trainee you can start at a 6 month review and keep adding them until you get to the final review.

However the moment you need to add an extra review in an ST year, for any reason, the review structure starts to break down. Evidence stops appearing in the correct place, you can run out of reviews and the process can get in a real mess.

Part time trainees need to use the long named reviews at the bottom of the list and this may not always be obvious or easy to understand.

6 month
12 month
18 month
24 month
30 month
Final Review
Additional ST1
Additional ST2
Additional ST3
Final review after extended training
42 Month Review (ST4 Pilot)
48 Month Review (ST4 Pilot)
First ST1 6 month (6 month)
Second ST1 6 month (12 month)
Third ST1 6 month (18 month)
Final ST1 6 month (24 month)
First ST2 6 month (30 month)
Second ST2 6 month (36 month)
Third ST2 6 month (42 month)
Final ST2 6 month (48 month)
First ST3 6 month (54 month)
Second ST3 6 month (60 month)
Third ST3 6 month (66 month)
Final ST3 Review (70 month)

The Change

Instead of the reviews within the ePortfolio having set names based on months into training, the reviews will be named with the ST year, followed by a number indicating which review this was for the trainee.

To look at a basic trainee, the following shows how these change.

Old System	New System
6 Month	ST1-1
12 Month	ST1-2
18 Month	ST2-1
24 Month	ST2-2
30 Month	ST3-1
Final Review	ST3-2

However you are not restricted to only 2 reviews in an ST year. You can add as many as necessary. Each time a new review is created for an ST year another number is added.

For example a Trainee fails the CSA and needs another 6 months training in ST3. The additional ST3 review can be created as ST3-3

This also has a benefit for part-time trainees. They will use the same review structures. Instead of having to select a specific part time review, additional reviews for the ST year are created.

For a 50% ST1 trainee:

Old System	New System
First ST1 6 Month (6 Month)	ST1-1
Second ST1 6 Month (12 Month)	ST1-2
Third ST1 6 Month (18 Month)	ST1-3
Final ST1 6 Month (24 Month)	ST1-4

So as needed, reviews can be created for each year.

This has a number of benefits.

- No more guessing which review you need to create
- The same system for part time and full time trainees
- Out Of Post Reviews can be easily included
- Easier handling of duplicate reviews

Creating Reviews

Some changes have been made to the creation of reviews. Administrators will now be able to create reviews, but not complete them. The administration function is limited to date and review type setting but not entering the review information and recommendations. This is to allow administrators to assist Educational Supervisors in this side of review management.

When you Select a trainee and click on Reviews, the layout you will see has changed slightly:

The screenshot shows a web interface with a sidebar on the left and a main content area on the right. The sidebar includes links for Personal Details, Data Protection Statement, Messages (0), Switch Roles, Regional Admin, Trainees, Deanery Panels, Status Reports, and Trainee, Mark. The Trainee, Mark section is expanded, showing links for Profile, Evidence, PDP, Reviews, View Log entries, and Progress to Certification. The main content area has a purple header for Submitted Reviews, followed by a table with columns for Review Referred on, Outcome, and Review Type. Below the table is a purple header for Review Dates, showing a list of dates and a link to Record New Review.

Review Referred on	Outcome	Review Type
01/02/2009	Satisfactory Progress	ST1 - 1

Review Dates

- 01/02/2009, ST1 - 1

[Record New Review](#) |

The reviews you are used to seeing on this screen are labelled Submitted Reviews. Clicking on the magnifying glass will allow you to view the 4 page review for the trainee as normal. The Review Dates section at the bottom will allow you to see all reviews in the system, with their date and type. Clicking on Record New Review will allow you to create a new review. Clicking on the date of a review, will allow you to edit the dates and types of those reviews.

The layout of review creation has changed slightly:

Old Layout:

Finish Review	
End of Review Period	01/08/2009 <input type="button" value="..."/>
Type of Review	12 month <input type="button" value="v"/>
During Post	01/08/2008 to 01/02/2009/Z RCGP Test Location 1/ <input type="button" value="v"/>
Location	Practice
Notes	<input type="text"/>

New Layout:

Create Review	
Set an appointment for your next review with this trainee.	
<i>Last review was ST1-1 on 01/02/2009</i>	
End of Review Period	01/08/2009 <input type="button" value="..."/>
Type of Review	ST1 <input type="button" value="v"/>
During Post	02/02/2009 to 02/03/2009/Z RCGP Test Location 1/ <input type="button" value="v"/> While in this Post they were in ST1
Location	<input type="text"/>
<input type="button" value="Save"/>	

As you can see, the Review date is still the same, but instead of selecting a month title, you select an ST year instead.

You get a reminder at the top showing the date on which the last review was created for the trainee, and you can see what ST year they were in during the post selected. The date for the review will default to 6 months from the last review, but this can be edited as needed.

Once saved, this will create a new review in the system, in this case an ST1-2

As an administrator you can go in and create and edit these dates for reviews as needed.

Please note: You won't be able to edit a review that a Trainee has accepted. These are finalised reviews and as such can't be changed.

Evidence Layout

The Evidence layout has been changed slightly to accommodate the new review layout. The single drop down at the top has been replaced with two. One selects ST year, the other review type:

Trainee, Mark

Posts / Meetings

Review Review Number

Forms submitted up to 01/02/2009

Summary	MSF	miniCEX	DOPS	CbD	COT	CSR	PSQ
Progress to next Review							
ST1 - 1							
Requirement	Completed	Minimum					
3 x mini-CEX or COT	2	3					
3 x CbD	3	3					
DOPS (as appropriate)	2	As appropriate					
Clinical supervisors' reports (if in secondary care)	1	1					
PSQ (if in primary care and not yet completed)	0	1					
MSF (5 clinicians only)	0	5					

[\[Posts\]](#)

You can select All Years from the Review drop down. This will show all evidence in the system.

You can also select All Reviews from the Review Number box to see all evidence for an ST year.

The evidence screen will always default to the current review for the trainee based on reviews created. In the case of a review not being created e.g. a brand new ST1, the system will look at the post the trainee is in and then display the correct ST year, and a (not created) review number.

Review Review Number

This will indicate that the trainee has not had an appropriate review created for them.

Due to the system needing to be as flexible as possible, for most review periods, all evidence types will be present, with some descriptors after them. There is also now an information link next to the minimum heading that will open up the minimum evidence page. We will be re-doing this page slightly for the release and adding links to the part time requirements as well.

What can you do?

There are a few things that you can do to assist with the transition to the new labelling system. We will be trying to reach as many users as we can, but it helps to have the message come from more than one source.

- Make users in your Deanery aware of the changes coming up.
- Distribute the change documents we will be supplying to appropriate users.
- Re-assure your trainees that their learning requirements will not change. We are bracing ourselves for this, but reassuring your trainees that all that is happening is labels are changing and not the requirements will help here
- **Please ask your trainees to check their posts and ensure all these details are correct. We are running an automatic conversion process to convert all the reviews from the old system to the new system. It is reliant on the information in the posts being correct. If posts are mis-labelled, the converted reviews will be too.**
- Ask for help. This can be a lot to take in. Our helpdesk will be more than willing to go over these in more detail and answer any questions you might have.

We recognised that the current review system was not robust enough to cope with the variety of situations that arise in training. We strongly believe this new system will allow much more flexibility for reviews and make the experience of using the ePortfolio better.

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