e-Portfolio Platform – Navigation, Troubleshooting & Demo

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OVERVIEW

• Resident ePortfolio – Key Features
• View 1: Learner Perspective
• View 2: Observer (Supervisor) Perspective
• View 3: Program Director / Program Administrator
• View 4: Competence Committee
• Frequently Asked Questions (FAQs)
• QUESTIONS
RESIDENT EPORTFOLIO – KEY FEATURES

- UBC is currently using the Royal College’s ePortfolio for PGME
- Allows for electronic capture of observations and other data
- Contains up-to-date Royal College educational standards and learning plans
- Enables Competency Committees to assess learners’ progress
- Facilitates learner and observer interaction
- Produces analytics and reports for monitoring and benchmarking
- Archives a physician’s learning data in a single secure location, follows the physician
- Private and shared permission layers
LEARNER RESPONSIBILITIES:

Plan Learning:
• Views program learning plans & milestones
• Selects training activities
• Requests observations from Observer

Participates in Learning:
• Works with Observers & Peers
• Reflects on observations & learning
• Contributes evidence of learning
LEARNER VIEW:

- View Program Learning Plan & EPAs by stage of training

Learners know what is expected of them at each stage of training via the Program Learning Plan, which includes EPAs.
**LEARNER VIEW:**

- **EPA with Milestones**

An EPA can be expanded to show all associated milestones, as well as the associated assessment information.

Discipline-specific milestones have been developed by the Speciality Committee and are based on the generic milestones of the CanMEDS 2015 Framework.
LEARNER VIEW:

• Observations

Learners can plan their learning by requesting an observation for a specific EPA...

...or review feedback from Observers by accessing completed observation forms.
OBSERVER RESPONSIBILITIES:

Supports learning:
• Works with learners
• Contributes narrative
• Reviews evidence

Prepares for observation:
• Reviews and accepts requests for observation
• Reviews EPAs and milestones

Observation encounter

Evaluates EPA/milestones & records data on ePortfolio
For the Observer, this is an “Observation To-Do list”.

After an observation encounter has occurred (either planned or ad hoc), the Observer completes an observation form.

An observation request can be accepted or declined.
OBSERVER VIEW:

• Completing an observation

...while other fields must be completed by the Observer. Several fields are mandatory, such as the final observation rating.
OBSERVER VIEW:

• Completing an observation (cont’d)

If the EPA is considered to be “in progress”, the Observer can rate the milestones individually and enter comments so the Learner receives more detailed feedback.
OBSERVER VIEW:

• Completing an observation (cont’d)

Finally, the Observer has the opportunity to evaluate the Learner on professionalism and patient safety.

Professionalism and Patient Safety:

Do you have any concerns regarding this Learner’s professionalism?

- No
- Yes

Do you have any concerns regarding Patient Safety?

- No
- Yes

If yes, description of concern:


LEARNER & OBSERVER: working together

Plan Learning:
• Views program learning plans & milestones
• Selects training activities
• Requests observations from Observer

Participates in Learning:
• Works with Observers & Peers
• Reflects on observations & learning
• Contributes evidence of learning

Supports learning:
• Works with learners
• Contributes narrative
• Reviews evidence

Prepares for observation:
• Reviews & accepts requests for observation
• Reviews EPAs and milestone

Observation encounter

Evaluates EPA/milestones & records data on ePortfolio
PROGRAM DIRECTOR / PROGRAM ADMINISTRATOR

Guides learning
• Meets with learners regularly
• Assigns EPAs to Observer
• Reviews learner progress using technology

Reviews program status
• Reviews program data and investigates issues
• Prepares for Competence Committee meetings
PD / PA VIEW:

- Review Learner Status

The PD / PA has a view of all Learners in the program and is able to monitor their progress. The PD / PA can access and view each Learner’s individual portfolio of completed observations. Other available actions include flagging a Learner, recording personal notes and adding documentation to the Learner’s record.
PD / PA VIEW:

- View Observers affiliated with Programs

The PD / PA also has a view of all Observers affiliated with the program in order to monitor and manage the observation workload.

Completed observation forms can be accessed so the PD / PA can review the type of feedback being provided by the Observer.
COMPETENCE COMMITTEE

Guides learning
- Meets with learners regularly
- Assigns EPAs to Observer
- Reviews learner progress using technology

Reviews program status
- Reviews program data and investigates issues
- Prepares for Competence Committee meetings

Assess overall achievement of EPAs & milestones
- Review learner EPAs/milestones
- Approve changes to learner status
  - Promote learner to next stage of training
  - Request Royal College certification
  - Modify Learner program plan
  - Monitor overall progress of learner
- Provides group decision process rather than single summative assessment
COMPETENCE (CC) COMMITTEE VIEW:

• CC Meetings

An agenda of Learners to be discussed is set for each CC meeting.

During the meeting the CC can access the Learner’s portfolio.

The Learner discussion ends with a decision on Learner status. The CC will select an action relevant to the status.

Notes from the Learner discussion can be captured, as well as any specific feedback that will be passed on to the Learner.
RESIDENT EPORTFOLIO
FREQUENTLY ASKED QUESTIONS
FAQs

1. **How do I access the Resident ePortfolio?**
   a) Using a web browser, go to: [https://mainport.royalcollege.ca](https://mainport.royalcollege.ca)
   b) The login page appears.
FAQs

c) If you do not know or have forgotten your Royal College ID, click the link “Forgot your Royal College ID?”. You will be asked to enter the email address on file with the Royal College.

d) You will then receive an email containing your Royal College ID.

e) If you do not know your password, click the link “Forgot your Password?”. You will be asked to enter your Royal College ID and the email address on file with the Royal College. You will then receive an email with a link that allows you to set a new password.
FAQs

f) Upon successful login to MAINPORT, click on the CBD Tab to access the Resident ePortfolio

2. What browser versions will support Resident ePortfolio?
The following **web browsers** will support Resident ePortfolio:
- **Internet Explorer (11.X, 10.X)**
- **FireFox (5x.0, 40.x)**
- **Chrome (5x.0, 45.0+)**
- **Safari (10, 9, 8.0.x)**

3. Can I use my mobile device?
Resident ePortfolio is built with a responsive design so it will adjust the display appropriately for the screen size, however if you wish to use the ePortfolio application while offline you will need to download the iOS APP from the Apple Store.
FAQs

• **APP** - available on the Apple Store as “Royal College Res ePortfolio”
• **ONLY Learner** and **Observer** views are available on the APP;
• NO Program Director, Program Administrator or CC views
FAQs

4. Can I use the APP on my device if it is not an APPLE device?
Not at this time, but a Google Android APP is in the scope for the next upgrade.

5. Am I able to receive notifications within Resident ePortfolio?
Yes, email notifications workflows have been set up for Learners and Observers, including but not limited to:
• Learner is notified when an observation request is submitted by an Observer; when an observation request is declined by an Observer; when an observation request has expired; of a status change decision by the Competence Committee
• Observer is notified when a Learner requests an observation; 24 hours prior to the expiration of an observation request that has not been accepted or declined; 24 hours prior to the expiration of an accepted observation request.
FAQs

6. Who can view my Dashboard?
As a user of Resident ePortfolio, you will have specific permissions regarding other users’ Dashboards. If you are a Learner, your shared view will be visible to your Program Director, Program Administrator, and all members of the Competence Committee. However, any documentation that is privately uploaded by you will only be visible to you.

7. How will I know if/when I’ve moved through stages within Resident ePortfolio?
Once the Competence Committee has met and discussed your progress as a Learner, they will finalize a decision regarding your promotion / demotion through the stages. Your Program Director should be discussing this decision with you. You will then receive a notification of the update from ePortfolio.

8. Where can I find additional training material for Resident ePortfolio?
Resident ePortfolio training materials are accessible from within the Resident ePortfolio system. Click the “Need Help?” link under the My Mainport logo to be directed to a set of training modules specific to each role in the Resident ePortfolio. You can choose to read this material online, watch and/or interact with short how-to videos, or print the information.
FAQs

9. Do we have a test or sandbox environment where we can try the platform?
Yes, UBC has its own ePortfolio test account:
a) Using a web browser, go to: https://mainport-test.royalcollege.ca
b) The login page appears.
c) Use the following table to log in with the various roles:

<table>
<thead>
<tr>
<th>Test User</th>
<th>ID#</th>
<th>Password</th>
<th>First Name</th>
<th>User Main Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBD Observer 01</td>
<td>2417819</td>
<td>pancake23</td>
<td>Anil</td>
<td>CBD Observer</td>
</tr>
<tr>
<td>CC Member 01</td>
<td>2417821</td>
<td>pancake22</td>
<td>Tierney</td>
<td>CC Member</td>
</tr>
<tr>
<td>Resident 01</td>
<td>2417823</td>
<td>pancake22</td>
<td>Rob</td>
<td>Resident</td>
</tr>
<tr>
<td>Resident 02</td>
<td>2417825</td>
<td>pancake22</td>
<td>James</td>
<td>Resident</td>
</tr>
<tr>
<td>Resident 03</td>
<td>2417827</td>
<td>pancake22</td>
<td>Kenny</td>
<td>Resident</td>
</tr>
<tr>
<td>CBD Observer 02</td>
<td>2417829</td>
<td>pancake22</td>
<td>Jenna</td>
<td>CBD Observer</td>
</tr>
<tr>
<td>Program Director</td>
<td>2417857</td>
<td>pancake22</td>
<td>Hugh</td>
<td>Program Director</td>
</tr>
<tr>
<td>Program Admin</td>
<td>2417859</td>
<td>pancake22</td>
<td>Jason</td>
<td>Program Admin</td>
</tr>
</tbody>
</table>

10. Who can I contact for additional support?
• eportfoli@royalcollege.ca  Monday to Friday, 8:00am to 5:00pm EST
• pgme.cbme@ubc.ca / eleni.tsakumis@ubc.ca   604-875-4111 Local 63315
QUESTIONS

REFERENCES: http://www.royalcollege.ca/rcsite/cbd/cbd-eportfolio-e
LINK TO CBD MODULE:  https://goo.gl/izkqrt

Competency by Design (CBD): Resident Training & Assessment