Report on the NHS ePortfolio Year End User Groups 2012

Introduction

NHS ePortfolio held a series of user group meetings across the UK in late November 2012, open to all users of the ePortfolio but with a special interest in hearing from clinical staff.

The open meetings were designed to serve a number of objectives including:

- Disseminating the future plans for ePortfolio and building them in conjunction with feedback from all user

- Providing an opportunity for users to speak their minds and share their ideas to improve the system

- Giving users a chance to meet members of the ePortfolio team (technical, training and managerial) directly and informally

- Offering a general discussion forum

This document will summarise the feedback received from the first three user group meetings held at the following dates and locations:

- York 19th of November 2012. Lecture Theatre, Postgraduate Medical Education Centre, York Hospital , Wigginton Road, York, YO31 8HE

- London 20th November 2012. Sherman Lecture Theatre, Sherman Education Centre, 4th floor, Southwark Wing, Guy's Hospital, Great Maze Pond, London SE1 9RT

- Perth 16th November 2012. Dental YUEG: Murrays hall Hotel

What users like about the NES ePortfolios system

To begin with the user group attendees were asked what they currently liked about the various ePortfolios covered (see appendix A for details).

Many of the attendees at the meetings expressed that an ePortfolio system was a good idea and certainly an improvement over the previous generations of paper training portfolios.

Specific user feed back highlighted the following points as reasons to like the ePortfolio:
- That the system is easy to use, works well or is user friendly (**Count: 6**)
- The concept of an electronic portal where all a medical user's achievements, career progression and individual records are collated in one place (**Count: 4**)
- The consistency of the ePortfolio across areas and the Standardised form system, that also enables consistent delivery of work based assessments (**Count: 3**)
- That an electronic portfolio saves on paperwork and is better than checking a paper portfolio (**Count: 3**)
- That the ePortfolio gives an auditable reliable record of training that can also be monitored (**Count: 2**)
- That multiple people are able to access a single portfolio (**Count: 2**)
- The Attention Items functionality (Yellow triangles) (**Count: 2**)
- Can access from any computer (**Count:2**)
- The included User Guides
- The 'My filled forms' function (a list of forms submitted – is useful for appraisal and will be useful for revalidation)
- The ePortfolio training site
- The progress summary sheet (FSRH ePortfolio)
- The ability to send messages to groups
- The 'Read more' pop-ups
- The study leave log
- The 5.1 & 5.2 forms (Foundation)
- An easy to use 360^{0} appraisal and feedback system
- That the system can log assessments done by me for others
- That an electronic portfolio is difficult to loose
- That it is easy to send repeat ticket requests/reminders
- Access to thoughts of trainees when they are not physically present
- Keeps trainees on top of work
- Appears secure
- The Speed, It's <u>MUCH</u> better than the old platform

The next question we asked was what the users dislike about the current ePortfolios.

In this case the specific feedback has been split into three categories; that pertaining to the technical implementation of the ePortfolio, that pertaining to the educational or programme content dictated to the ePortfolio providers by the various commissioning bodies that control the core function and content of the ePortfolios, and finally, the feedback pertaining to the governance of the ePortfolio.

Dislikes relating to the technical implementation or website design of the ePortfolio

- The speed of the website, especially at peak times (**count: 7**)
- The lack of reporting functionality or errors with existing reporting functionality (**count: 4**)
- That users can not move easily from one trainee to another as an admin or supervisor role (**Count: 2**)
- That the ePortfolio is not intuitive if you are an infrequent (educational supervisor) user
- That checking trainee progress can be long-winded
- That the 'Links' function is not standardised – i.e. can't link certificates to reflections; can't link curriculum to certificates; excessive links or no links
- That the Summary overview doesn't tell you who the assessor is on the forms
- That you are unable to look at other parts of the portfolio while completing form (e.g. refer to SLEs whilst completing supervisor's form)
- That it takes multiple clicks to access pages
- That there is an inability to organise personal library (e.g. drag and drop files between folders)
- The ticket request process
    - That a user can't tell when a reminder was last sent to judge when to send the next one
    - That a user can't edit ticket once its been sent – e.g. if name or email is wrong
    - A need for outstanding tickets to be visible with status (on summary overview screen?)
    - Ping back to students/juniors when done
- The Manual entry and enrolment of trainees
- That there are no back functions when searching lists of trainees
- The time consuming processes in some areas i.e. linking (but acknowledge this is now resolved)
- That some users find there is no help available, messages are not replied to
- That the website is difficult to navigate and difficult to know where to put things/docs

- One user gave the example that supervisors don't like it enough to use it – a trainee had to copy PDP into word doc and email to a supervisor as the supervisor couldn't use ePortfolio well enough to view PDP on it
- Unreliability
- Can't use the link button directly from all forms
- Having to select trainee each log in (count: 2)
- The box for writing in the trainee's week 9 review only let you see a few words at the time which made editing difficult
- Can't see whether trainee and trainer have both signed of LEPs at a glance
- Menu design haphazard, could be significantly improved. Once further forms added may get messy and difficult to find items
- When you have to hunt around for functionality if using initially

Dislikes relating to the educational content or usage requirements of the ePortfolio

Many of the dislikes highlighted by the user feedback were actually linked to the overarching educational concepts behind the use of an ePortfolio or linked to the specific educational forms or functions designed by the commissioners of the various ePortfolios.   Although the NES ePortfolio team can not make changes to these forms without instruction from the commissioners, it is felt that it is very important to collect this type of feedback so it can be passed onto the responsible parties.

This section also includes comments linked to the provision of guidance materials or user training as these responsibilities are the domains of the ePortfolio commissioners, not the NES ePortfolio team.

The specific feedback in this category was:
- That the new Foundation Supervised Learning Event Forms (SLEs) were disliked by some users (**Count: 3**). Specific comments about the SLEs were:
  - They are non numerical
  - They represent 'tick box' not excellence
  - That there are no ratings so do not record standard of excellence but instead are a measure of average competencies
- That Educational & Clinical Supervisors need more training (**Count: 2**)
- The rigidity of forms or that the reflection proformas are too restrictive (**Count: 2**)
- The Linking on SLE forms function makes the form difficult to complete (it was suggested that text boxes should be above the curriculum boxes to make it easier to complete
- That the ePortfolio takes users time to complete
- That the forms are not comprehensive
- That the user disliked the fee they were charged by their College and the related duration of use restriction

- That the storage space needs to be increased (NES note: the size of the personal library is decided by the various commissioners)
- That as a manager the user didn't like the hassle it causes trainees
- That as a supervisor little mistakes on forms are not able to be edited by local administrators e.g. additional users
- That as am administrator there was 'not enough training'
- That there was no user control of functionality, an example being that this user did not feel that the reflections were functional
- That Ticket **requests** went unfilled. This user asked if there was any way of penalising those who are constantly late and reassign supervisors and thus ensure proper training.
- That the user disliked the hassle it causes their trainees and the difficulty of keeping it up do date, the user n question would like to have more control over content and functionality.
- How tedious the curriculum is to fill in.
- No 'Work in progress' save function on certain forms
- More flexibility when completing dialogue boxes with regards to question fields – there is lots of repetition, you need to enter trainee and trainer name every time, less mandatory fields.
- The fact that some of the fields are mandatory even though you might not have any relevant to write in that box, you must do so before completing that page.

Dislikes relating to the Governance of ePortfolio

In a question "What do you know about who makes the decisions that affect the ePortfolio?" many of the respondents expressed that they did not know what structures governed the ePortfolio, or even which bodies dictated the function and content or most ePortfolios.

Specific feedback on this matter was:
- A perception that changes to the ePortfolios are made according whoever shouts the loudest
- A perception that changes are made by 'educators'/Deanery rather than Colleges

Other Dislikes

This final section represents dislikes mentioned by the YEUG attendees that the NES team do not necessary agree that exist. It may be that the users who mentioned these items are not aware of the functions in question, so that may be the source of some of the items. Others were dislikes mentioned that NES are uncertain what they mean.

- Need to be able to move forms between placements (NES note: this can be done)

- Can't add more than one curriculum (NES note: this can be done)
- Searches are not accurate (NES note: not sure what the specific issues is here, but we think that the searches on the ePortfolio are accurate)
- Can't report failure/Help centre (NES note: this can be done)
- No password reminder (NES note: this can be done)
- Trainer cannot select external form for trainee, trainee has responsibility for this (NES note: this can be done)
- When sending external assessment request you need to know the email address for the assessor (NES note: email is usually entered but is not required)

Dislikes that we are uncertain what they mean:
- Unnecessary themes
- You can't find things out for your self
- Final report needs smarter summaries (NES note: uncertain which form or report this comment relates to)
- Can leave open forms if staff don't sign on enough
- When you cannot move 'horizontally' through trainee

Towards the end of the user groups we asked two questions. Firstly, what extra activities would users like to see available on the ePortfolio system and secondly, suggested changes to the current features of the ePortfolio system.

Again we have split this feedback into categories so that we can better discuss it in the future.

Technical changes

The first set of suggestions relates to technical changes to existing content or functions.

The suggestions were:
- A save as draft option on the "Clinical supervisor end of placement review" form (foundation) (**Count: 3**)
- To make the site more user friendly streamlined/easier to navigate (**Count: 2**)
- To add the ability to have both personal/work options on the default email
- An early warning via email to supervisor of a 'Attention Item' warning
- The ability to move from Trainee to Trainee easily
- That core procedures to be shown like the TAB and like ones linked
- To change the personal library to make it easier to move things around, so there would be no need to delete. E.g. files wanted in an F1 folder and the in F2 folder
- That 'better' reporting tools are made.
- To add 'assessor grade' and SLE title to each SLE display on the SLE summary screen for administrators
- To increase storage in the personal library
- To improve speed at peak times
- To add a drop-down box to the end of placement review/initial placement meeting form to allow selection of the appropriate post (this would reduce admin time moving forms)
- To allow linking of reflections to certificates
- To allow linking of certificates to the curriculum
- To make the curriculum signature function a tick box

New Technical projects

Some of the requests we received were technical in nature, but were suggestions for entirely new features rather than changes to existing content.   It would be the decision of the ePortfolio 'commissioners' to request any of these new features.

The suggestions were for:
- A tablet /smartphone/iPhone & iPad application for offline submission of assessments use (**Count: 3)**
- Better reporting functions, including the ability for a user to create their own reports
- More user roles e.g. a 'Super tutor' who could search for students
- For a summary of curriculum/competence sign-off area of the ePortfolio to be designed
- Generate reports across a scheme e.g. show LEP returns for all scheme VDPs on a single view
- To be able to see all trainees in one scheme on one page with summary table of numbers of assessments of various types submitted at that time
- A single report detailing numbers of LEPs submitted, signed of by all trainees in a particular scheme
- Storage and linkage of CPD records and Forms/Audits
- Needs improvements LEPs highlighted via alerts, then repeat LEPs should be able to be linked to the original NI LEP. This LEP can then be signed off as meeting standard by DAU
- To get regional/national summaries of overall detailed trainee progress throughout year
- Personal development plan for returning and retraining dentists and house their progress so it can be monitored 'remotely' by a number of trainers

Educational changes

Much of the feedback we received was not directly related to the ePortfolio website, but was instead aimed at the educational forms with suggestions for revision or for new content.

The suggestions were:
- To make a decision: Is the ePortfolio a learning tool or a recording tool?
- More general feedback mechanism are needed, for example, if a senior reg or consultant thinks I've done something specifically well, they want to include something in ePortfolio without doing a CBD/mini-CEX but a general feedback area
- To revert SLEs back to numerical form in addition to free text – this would make then more objective than subjective
- To change templates for reflection (more structure or less structure? – different views)
- To encourage trainees to prepare for end of placement meetings with their educational supervisor
- To require every SLE or educational event entry to have an associated reflection

Collaborative projects

There was a desire to see the ePortfolio link into a number of other computer or web based systems.

The suggestions were:
- Links to other e-learning sites (**Count: 2)**
- Feed into college database (e.g. training level)
- Develop further links to the Foundation Programme Application System (FPAS) and to link to Intrepid (The deanery HR database)
- Direct link to NHS dental portal without needing to enter login details

New core functions

The user groups expressed a desire to see the ePortfolio expand away from just being a portfolio of evidence for training and into other domains, including Human Resources systems, activity monitoring and social media. Because these would represent new directions they have been included in this separate section.

The particular requests that were mentioned were:
- For CPD/certificate record/Staff record functions
- To Log activity e.g. today's activity
- The ability to open account to others for commenting. Blog style e.g. others to comment on reflections in conversation

Improved access to ePortfolio information for interviews

There were two requests to make it easier to use the content a trainee user has in their ePortfolio at interviews. Whether this would require changes to interview processes or the ePortfolio itself was not suggested.

The suggestions were:
- That the user wished they could use it and access it at interviews (cannot currently access online at interviews)
- To allow more information to be exported to help job applications

Process and Faculty changes

Some of the suggestions received were to do with the processes associated with using the ePortfolio rather than the actual tool itself.

The suggestions were:
- For more training and guidance to users

The following question was also posed:
- Educational supervisors don't always read information distributed by email or ePortfolio message, how to communicate?

The NES ePortfolio department supply ePortfolios to the following medical groups:

- Undergraduate ePortfolios
    - Brighton and Sussex Medical School
    - Keele University School of Medicine
    - Queens University Belfast Medial School
    - University College London Medical School
    - University of Bristol Medical School
    - University of Glasgow School of Medicine

- Foundation ePortfolios
    - East Midlands Deanery
    - East of England Deanery
    - Kent Surry and Sussex Deanery
    - London Deanery
    - Malta Deanery
    - Mersey Deanery
    - Northern Deanery
    - Northern Ireland Deanery
    - Oxford Deanery
    - Peninsula Deanery
    - Scotland Deanery
    - Wales Deanery
    - Wessex Deanery
    - West Midlands Deanery
    - Yorkshire and the Humber Deanery

- Specialty Training / Faculty ePortfolios
    - College of Emergency Medicine
    - Community Sexual Reproductive health
    - Faculty of Sexual and reproductive health
    - Joint Royal Colleges of Physicians
    - Royal College of Obstetrics and Gynaecology
    - Royal College of Paediatrics and Child Health
    - Royal College of Physicians of Ireland
    - Royal College of Radiology

- Dental ePortfolio
- Pharmacy ePortfolio
- Nurse Mentor ePortfolio
- Career Long Nurse and Midwifery ePortfolio