

## JRCPTB ePortfolio V2.o Known Issues

This document records known problems and request with the ePortfolio. We are working to have these resolved in the coming weeks and months according to the assigned priority. This list will be updated at regular intervals.

<b>Topic</b>	<b>Problem / Request</b>
Associations	Linking functions needed to link assessments and reflections to curriculum competencies
Admin - Trainees	Addition of following selection options needed: Location (e.g. so a deanery admin can choose to only see one hospital) Specialty Sort by Name; Location
Admin - Trainees	List of trainees should show current supervisor/tutor to make it easy for admins to see who has not been set up properly.
Supervisor view - trainees	Select trainee list shows all trainees ever supervised and there is no way to select to show current or previous trainees as can be done in V1.
Supervisor view - trainees	The list of trainees is not sorted by name.
Assessment	When trainee enters an assessment form the assessor name and GMC defaults to the trainee's details but this is not appropriate and is leading to forms being saved with the wrong data on which can't be corrected. Please remove this default. This does not apply to MSF self-assessment.
ARCP	There is a mistake (from the original documentation) on the V1 ARCP form which needs correcting in V2. What is currently described as "Outcome 7 Out of programme experience approved" should be "Outcome 8 Out ...". We also need to include a new option "Outcome 7 Fixed-Term Competencies Achieved".
Supervisors	Supervisors need to add historic assessments/ appraisals to trainee that were once in their care but are being restricted. Can be a cut-off but they may need to do this just after transition periods particularly end-of-attachment appraisals.
PDP	Default to shared not private
PDP	The layout of the PDP page now means it is not possible for the supervisor to scan down the page and see all the objectives without having to click into each one. Please can we have this back again. Current columns mainly of less interest.
PDP	Not possible to select to see only active items - may become a long list.
PDP	Supervisor sign-off of PDP entries is not required and should be removed to avoid any suggestion that we require supervisors to do this. It does not work well anyway as it is, as a supervisor might sign it to show approval of the objective but then the trainee can never update it as having been achieved.
Assessment	In version 1 we removed the numbers from the ratings in the assessment forms to remove any suggestion that ratings had numerical meaning. The numbers have reappeared in V2 but should be removed.
Assessment	New request: On mini-CEX, DOPS, CbD, ACAT forms can we have a new field for "date of assessment" which defaults to today but can be changed. This allows for cases when the actual assessment encounter took place on one day but the form was filled in later.
Assessment	When entering an assessment via a ticket the system knows the grade of the assessor but it is not carried onto the assessment form and has to be reentered.
Assessment	Trainees should be able to add comments to assessment forms (DOPS, mini-CEX, CBD, ACAT), which have been entered by someone else.
Assessment	Autofill the trainee's year (designation) on assessment forms, as ratings are dependent on stage of training.
Assessment	The Clinical Setting is a drop down list which is not a complete set of possibilities – we think it would be easier to just make it a text box as for mini-CEX and make it non-mandatory

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Request External Work Based Assessment	Choice of posts allows "Programme" but this should be removed.
MSF	If a rater selects the answer "Yes" in response to the question "Honesty and Integrity, do you have any concerns?" then the box "If yes please state your concerns:" should become mandatory. We would like the addition of a "Supervisor's Comments" text box on the summary page where a supervisor can record their feedback.
FAQs	FAQs contain a lot of things we do not want because they are misleading, inaccurate, inappropriate - should only be the set we have provided for our users or ones that we specifically agree to.
Reflection	Trainees build up large numbers of reflections so we need tools to allow for selection of which entries should be displayed. Exists in V1 but see item 4.4. in V2 reqts spec. Inclusion of data range selection would be a big help to supervisors.
Reflection	Supervisors countersignature on reflections is not needed and should be removed as we do not want to give the impression that it is a requirement for supervisors to "approve" reflections. Ability to add comments is still needed.
Reflection	Default to shared not private on new logs
Summary Overview	Ability to select a date range and only show rows where data exists in this range would be a big help to supervisors in knowing what to look at.
Summary Overview	The "Type" column is unnecessary, the text "2 submissions" is too long - just the number would do, and the wording "create new" on every row is not needed. Tidying this up would allow each row to be kept at 1 line reducing scrolling. Addition of a date column showing the date of the most recent addition in each row would help so that a supervisor could then see what had happened in the last week/month that they should look at.
Summary Overview	In the Summary Overview page we think the date / specialty / hospital needs to be displayed in the subheading for each post – we don't think date and hospital is enough at the moment
Post / Supervisor Details	This text is incorrect: "Below are the posts and supervisors listed for this account on ePortfolio. If the current details are missing or incorrect, please contact Support to assist in correcting this." Should be "contact your local administrator" but ideally give specific names. Will think about this more.
Supervisor's Report	Display of post data, assessment counts, defaulting of fields, etc. as specified in the document "supervisor's report e-p spec"
Supervisor's Report	This page to be made active rather than just text description
ARCP	Trainees and supervisors must not be able to write/save the ARCP. Should only be selected roles as defined in V2 spec 4.6.3. Temporary solution in place allowing supervisors and admins but not trainees.
ARCP	The following fields should be autofilled from existing data: Deanery, Specialty and Training Year.
ARCP / Personal Details	NTN should be autofilled on the ARCP form but this relies on it being added as a new field in Personal Details
ARCP	The list of posts should be based on the dates selected.
ARCP	Need to change references to "Record of Competence" and "Shared Logs" to reflect new terminology in eP: "The ePortfolio documents completed in this period were reviewed. This included the appraisals, PDP, workplace assessments, supervisor reports, curriculum and reflective practice
ARCP	Outcomes don't look good squeezed onto page and with spelling mistake "outcom". Should we change both Interim and ARCP outcomes to be drop-downs lists? Use of the Interim or ARCP outcome should be limited according to what was selected in the first question.
ARCP	This page to be made active rather than just text description

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Assessment Ticket Entry	On the ticket forms page when the assessment forms are show we need to include a link to the description of each method as is shown on the assessment page to trainees/supervisors.
Assessment Ticket Entry	After entering an assessment via a ticket I did not get a confirmation / thank you page - just back to the confirm details page.
Admin Users	It is possible to give people a role of Limited Admin but if you log in with this role there are no menu options available at all.
User Roles	New roles needed for Clinical Supervisor Programme Director Regional Reviewer Central Reviewer
Admin - supervision	Administrators cannot look at a supervisor and tell which trainees they are currently supervising - this would be very useful.
Admin posts	List of specialties is wrong - see section 3.12.3 of V2 Requirements Specification.
Admin posts	ACCS is not a grade it is a programme/speciality like CMT. It should not appear on the list of grades anywhere in the system.
Report - summary	Selection options not right for us - post number, foundation forms not needed
Reporting - individual	When run individual report and click on name of trainee, displays home page of wrong trainee (Shannon Umbunto)
Appraisal	Please can a "Meeting Date" be added to the Induction Appraisal and Mid-Point Review forms.
Appraisal	Should be able to add a selected appraisal from the appraisal overview page rather than unnecessary steps of "add new" form then selecting the appraisal from the following page.
Appraisal	All appraisal forms should allow for explicit sign-off by both the supervisor and trainee and for the trainee to have the opportunity to add comments. Also applies to ARCP.
Download	Download not yet working
Download	Allow the ability to limit the data, e.g. by date range, academic year, "programme" (e.g. Foundation, CMT), by posts.
Declarations	On the probity and health declarations there is an option for the supervisor to edit and save these but this is meaningless as there is nothing to edit.
MSF	Process of requesting tickets for individual assessors is slow and cumbersome. Need a way of recording the list and making this visible to supervisor so they can see who has been asked and who is yet to respond.
MSF	Administrators should not be able to release MSF summaries as they may not understand the implications of doing this if asked by trainees.
MSF	Limit of 4 MSF entries being required is not based on JRCPTB view which requires minimum of 12.
Messaging	Messaging not working yet
Courses and Seminars	Under construction
Administering Information	Under construction
Menus	Font size on the trainee menu seen from the supervisor view seems very small