

JRCPTB ePortfolio training user guide December 2013

**GUIDANCE FOR DEANERY,
POSTGRADUATE CENTRES AND TRUST
ADMINISTRATOR**

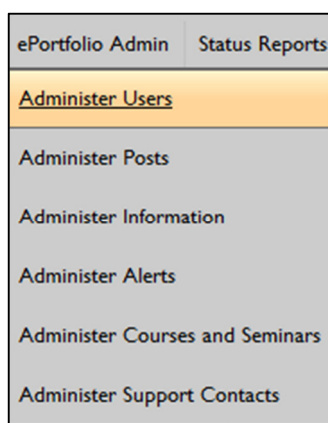
How to add a new user role to an account

Majority of the trainees will already have an ePortfolio account, particularly if they have come through from Foundation.

To avoid creating duplicating accounts, please ensure a thorough search is carried out first BEFORE a new account is created. Read guidance on 'How to locate a trainee' for further assistance.

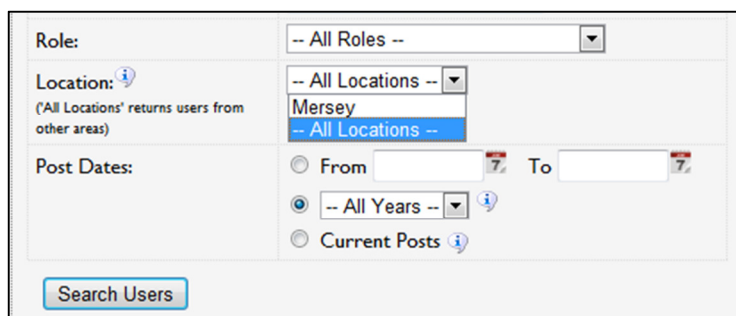
Step 1:

Once you have logged in using the physician administrator role click on 'Administer Users' menu under the ePortfolio Admin tab.



Step 2:

You can search for an account using any of the search fields. If you are unable to locate an account select 'All location' for the search to bring up accounts that are not within your location or have an existing account from Foundation or other Colleges.



If an account already exists, this will appear on the screen. Click on the name to take you to the account.

| Search Results | | | | | |
|--|----------------------|------------------|-------------|----------|-------------------|
| Below are the users that match your search criteria. If you don't find the user you are looking for, try broadening your search by removing one of the search criterias above. | | | | | |
| <i>Note: trainee accounts and posts created using the Bulk Post Creation process will not appear in this list until the trainee has logged into their account. If you are unable to find a trainee in the list below, try searching on the Administer Bulk Post Creation page before attempting to create a new account.</i> | | | | | |
| 1 - 1 records displayed out of 1 | | | | | |
| sort by last name, first name (asc) GO items per page 10 GO page 1 of 1 GO | | | | | |
| Name | Current Programme(s) | Current Posts(s) | Supervisors | Location | Roles |
| Stone, Timothy | | | | London | Physician Trainee |

Step 3:

If you locate an account and it doesn't appear within the correct deanery location, you will need to update this by clicking on 'Admin roles'.



Step 4:

Click on 'Add new location permission'.

| Location Permissions | | |
|----------------------|---------------------------------|--------|
| Role Name | Location Permission | Action |
| Physician Trainee | ePortfolio > Physician > London | |

Add New Location Permission

Step 5:

Select the correct role you want to add e.g. 'Physician Trainee'.

Add

To add a new Location Permission for this user, select the Role below, choose a Location node for the Role (use the plus signs next to the regions to find the specific hospital if desired), then click "Add Location Permission".

| User Information - Location Permissions | |
|---|---|
| Role Name | -- Select -- -- Select -- Physician Educational Supervisor Physician Clinical Supervisor Physician Academic Supervisor Physician Administrator Physician ARCP Assessor Physician Central Reviewer Physician Limited Administrator Physician Trainee |

Step 6:

Now you need to add the location of where the user is based and then select 'Add location permission'

Locations

- Macclesfield
- Mid Cheshire Hospitals NHS Trust
- Not Placed
- Overseas
- Royal Liverpool Children's NHS Trust
 - Alder Hey
 - Royal Liverpool Children's
- Southport & Ormskirk NHS Trust
- St Helen's and Knowsley Hospital Trust
- The Royal Liverpool and Broadgreen University Hospitals NHS Trust
- Warrington & Halton NHS Trust
- Wirral University Teaching Hospital

Add Location Permission Cancel

This is the same administration you will need to do for other roles you want to add.