

JRCPTB ePortfolio training user guide December 2013

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

How to move forms

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.

Assessment forms completed by trainees and supervisors can sometimes be attached to the wrong training post. This can be corrected by moving the relevant form(s) to the correct training post.

Once you have logged in through the Physician Administrator role follow the steps below.

Step 1:

Forms that have been incorrectly completed or assigned to the wrong posts can be moved across.

On the trainees account, select 'Move forms' tab from the left side menu.

Admin Personal Info
Admin Programmes
Admin Posts
Admin Photo
Admin Roles
Reset Password
Move Forms
Supervised Trainees

Step 2:

Select the post that has the incorrect forms assigned and then click 'Next'.

Step 1: Select Source Post Step 2: Select Forms Step 3: Select Target Post Step 4: Confirm Move	Step 1: Please select a post currently associated with the form: <ul style="list-style-type: none"><input type="radio"/> ST8 - Royal Liverpool University Hospital (01 Aug 2017 to 31 Jul 2018)<input type="radio"/> ST7 - Royal Liverpool University Hospital (01 Aug 2016 to 31 Jul 2017)<input type="radio"/> ST6 - Royal Liverpool University Hospital (01 Aug 2015 to 31 Jul 2016)<input type="radio"/> ST5 - Royal Liverpool University Hospital (01 Aug 2014 to 31 Jul 2015)<input type="radio"/> ST4 - Royal Liverpool University Hospital (01 Aug 2013 to 31 Jul 2014)<input checked="" type="radio"/> LAT - Royal Liverpool University Hospital (01 Aug 2012 to 31 Jul 2013)<input type="radio"/> CT2 - Bromley Hospital (01 Aug 2010 to 31 Jul 2011)<input type="radio"/> CT1 - Bromley Hospital (01 Aug 2009 to 31 Jul 2010) <p style="text-align: right;"><input type="button" value="Next"/> <input type="button" value="Cancel"/></p>
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Step 3:

Select the form(s) that need to be moved and then click 'Next'.

Step 1: Select Source Post Step 2: Select Forms Step 3: Select Target Post Step 4: Confirm Move	Step 2: Please select the forms to move: <ul style="list-style-type: none"><input checked="" type="checkbox"/> Interim Review (25 July 2013 12:01) 🔍 <p style="text-align: right;"><input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel"/></p>
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Step 4:

Select the correct post/placement the form(s) need to be moved to then click 'Next'.

Step 1: Select Source Post Step 2: Select Forms Step 3: Select Target Post Step 4: Confirm Move	Step 3: Please select a Target post to move the form(s) to: <ul style="list-style-type: none"><input type="radio"/> ST8 - Royal Liverpool University Hospital (01 Aug 2017 to 31 Jul 2018)<input type="radio"/> ST7 - Royal Liverpool University Hospital (01 Aug 2016 to 31 Jul 2017)<input type="radio"/> ST6 - Royal Liverpool University Hospital (01 Aug 2015 to 31 Jul 2016)<input type="radio"/> ST5 - Royal Liverpool University Hospital (01 Aug 2014 to 31 Jul 2015)<input checked="" type="radio"/> ST4 - Royal Liverpool University Hospital (01 Aug 2013 to 31 Jul 2014)<input type="radio"/> LAT - Royal Liverpool University Hospital (01 Aug 2012 to 31 Jul 2013)<input type="radio"/> CT2 - Bromley Hospital (01 Aug 2010 to 31 Jul 2011)<input type="radio"/> CT1 - Bromley Hospital (01 Aug 2009 to 31 Jul 2010) <p style="text-align: right;"><input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel"/></p>
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Step 5:

You need to confirm that that you want to move the form to the post you have identified. If this is correct then click 'Finish'.

Step 1: Select Source Post Step 2: Select Forms Step 3: Select Target Post Step 4: Confirm Move	Step 4: Please check the details below and then click on Finish to move the form(s): <p>From Post: LAT - Royal Liverpool University Hospital (01 Aug 2012 to 31 Jul 2013) To Post: ST4 - Royal Liverpool University Hospital (01 Aug 2013 to 31 Jul 2014) Form(s) To Move: Interim Review (25 July 2013 12:01) 🔍</p> <p style="text-align: right;"><input type="button" value="Previous"/> <input type="button" value="Finish"/> <input type="button" value="Cancel"/></p>
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If you have made any errors, select the 'Previous' button and go through steps 2-5 again.