# 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:

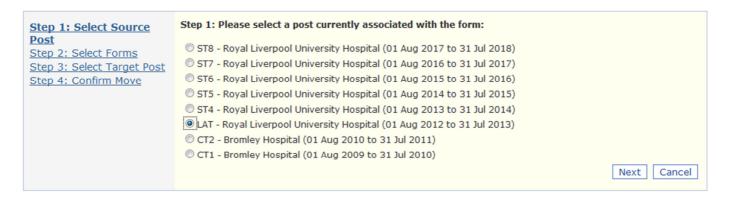
Forms that have been incorrectly completed or assigned to the wrong posts can be moved across.

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



# Step 2:

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



## Step 3:

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



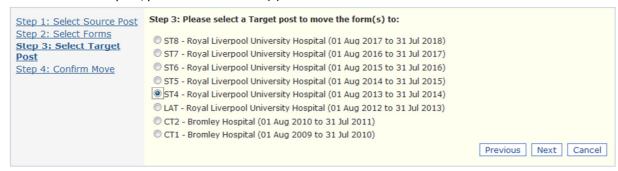






#### Step 4:

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



## 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'.



If you have made any errors, select the 'Previous' button and go through steps 2-5 again.





