MBChB Year 5

Clinical & Educational Supervision

E-portfolio Guide

2024-25
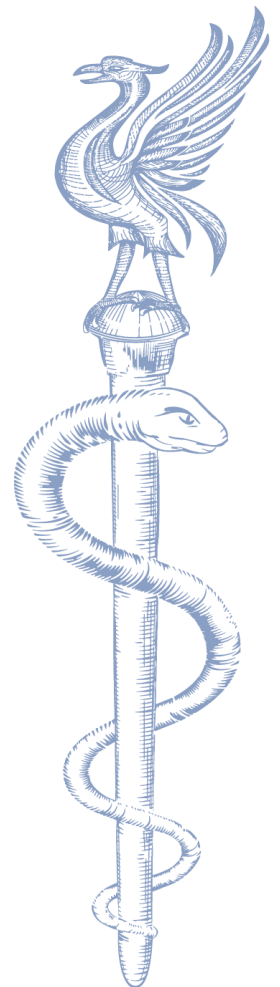
Contents

1. Introduction

This document provides step by step guidance highlighting how Educational Supervisors can use the key areas of the e-portfolio system, as staff supporting student doctors. The structure of this guide maps directly onto the structure of the clinical programme for Year 5. We hope it provides useful information in an easily accessible format. If you have further questions which are not answered within these pages, please contact the dedicated e-portfolio e-mail address: eportfolio.mbchb@liverpool.ac.uk

All educational supervisors will require access to the MBChB E-portfolio to complete the educational supervisor sections and review the placement activity of their student doctors. Full details, including examples of the forms are provided in this Technical Guide which goes alongside the 'Clinical & Educational Supervision Handbook'.

You will meet your allocated student doctors on a regular basis to assess their progress and support them through the clinical placement. To achieve this, student doctors will meet with you to review and discuss cases or skills that they have performed or observed. This will help to determine the student doctors' progress and completion of their placements. Educational Supervisors will complete forms, select outcomes, and write feedback in indicated fields in the student doctors' workbooks.

1.1 Logging in and accessing the E-portfolio System

When you meet with a student doctor you must log into the e-portfolio system to complete the online forms and add your feedback and grades.

Recommended Browsers: Chrome, Safari and Firefox

Click the following link to log into the e-portfolio system. We recommend that you add this link to your Bookmarks on your browser for easy access to the e-portfolio. This link will take you directly to the University of Liverpool sign in page. If you access the generic PebblePad log in, simply select 'University of Liverpool' when prompted to select an organisation. The generic login page is most commonly used by supervisors who work with students from multiple universities and can be seen in the screenshot below:
https://atlas.pebblepad.co.uk/atlas/liv [**PebblePad Login web link**]
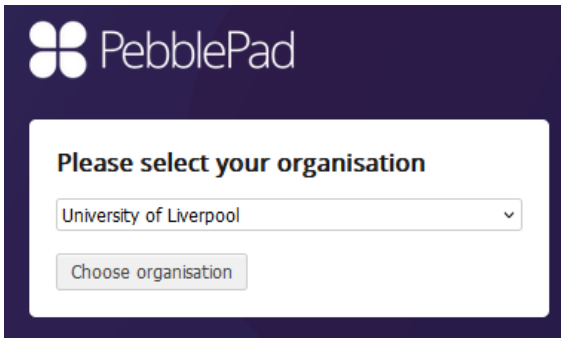
1.2 Resetting your password

If you forget your password or have issues with logging in, please click on the 'Forgot password?' hyperlink on the log in page:
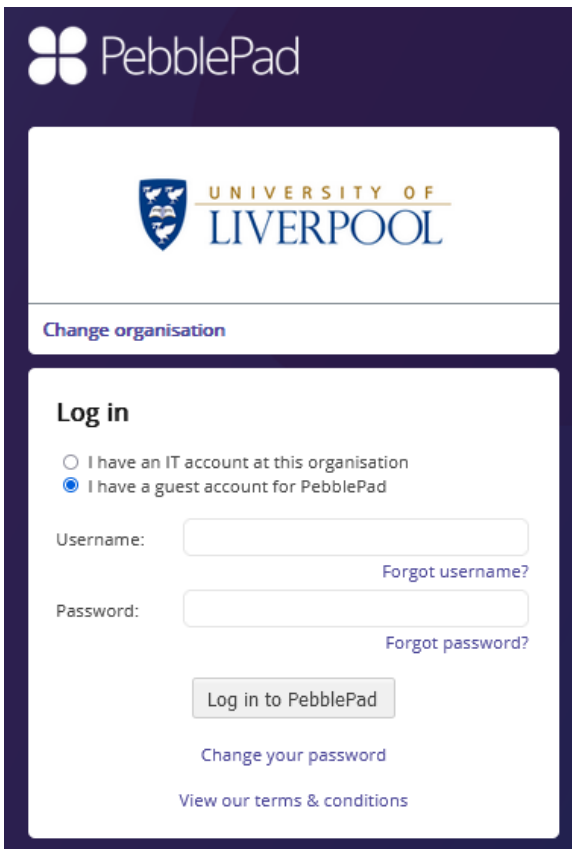

This will look the same whether you have an IT account, or a guest account. Following a password reset request, you should receive an email from PebblePad with a personalised, one time use password reset link.

Please note, it may be possible that NHS servers block this email. If you do not receive it within a reasonable amount of time, please contact eportfolio.mbchb@liverpool.ac.uk

The E-portfolio team will then contact you directly with the password reset link.

1.3 I have an IT account at the University of Liverpool

Ensure the following is selected '**I have an IT account at this organisation**' then click the option '**Login**' and login with your university account details. The ATLAS homepage will appear where you can view the workspaces you have access to in the E-portfolio system. The screenshot below is taken from an administrator point of view. It will look similar for you; the only difference is that you will only see workspaces you have been granted access to – in this case **MBChB Year 5 Assessment 2024/25 ATLAS**:
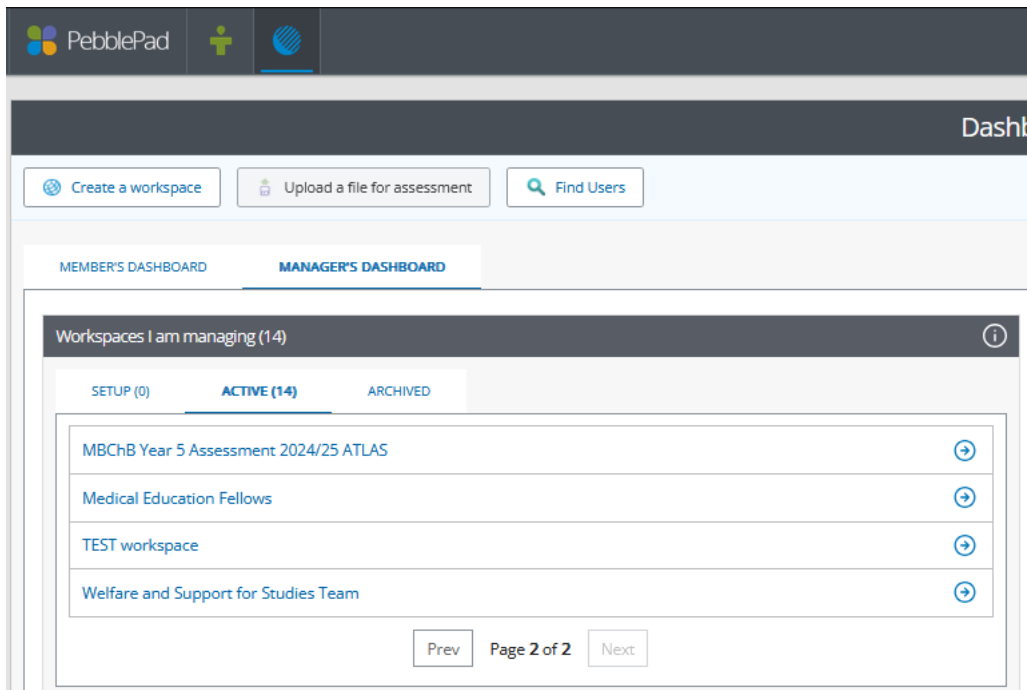
1.4 I do not have an IT account at the University of Liverpool

You will be added to the e-portfolio as an external member of staff, please ask your Education Centre to contact the e-portfolio administrator to verify that you require access. Once confirmation is received you will then be added to the appropriate workspace using your Trust email address.

Once you have been added to the system you will receive an email which contains your username and password, and you will be able to login. Click the following link to log into the e-portfolio: https://atlas.pebblepad.co.uk/atlas/liv [**PebblePad Login web link**]

Click '**I have a guest account for PebblePad**' and enter the login details that have been emailed to you from PebblePad. Once you have entered these details click the option '**Login to PebblePad'.**

The process of accessing workspaces and resetting passwords is the same as for supervisors with an IT account, please see above for screenshots.

To access the workspace, simply click on it from your ATLAS dashboard. In your case, it will be:
MBChB Year 5 Assessment – 2024/25 ATLAS
Although if you have been granted access to multiple years, you will be able to select them as well.
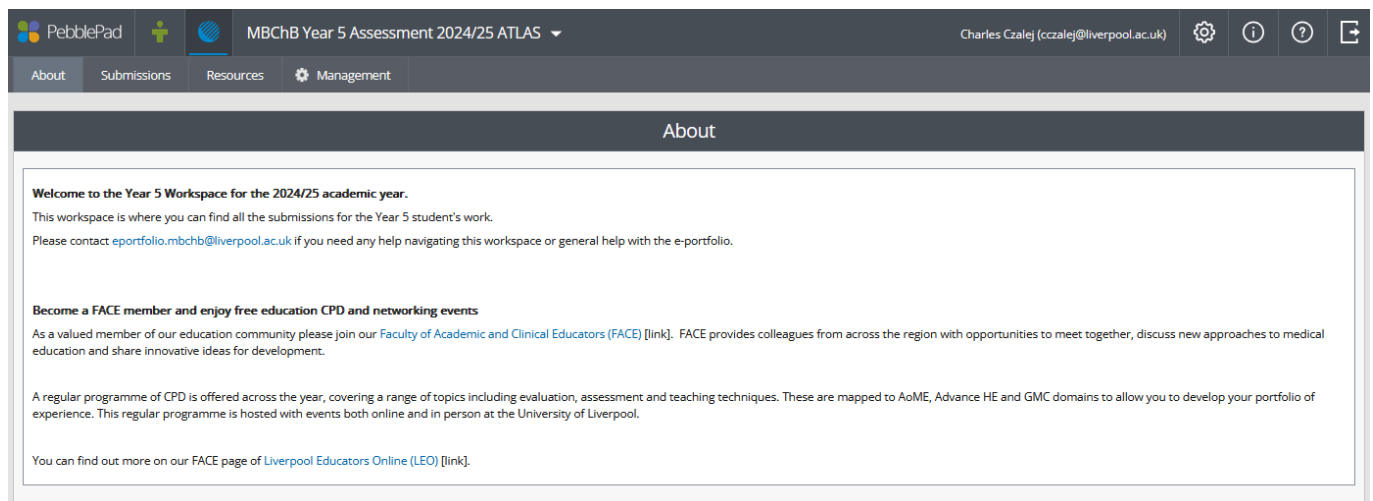
2. Viewing workspaces and managing access

If you already have access to the e-portfolio, when a new academic year starts, this will be automatically added to your account. For example, if you have been a Year 5 Educational Supervisor, upon logging in during academic year 2024/25, you will be able to see MBChB Year 5 Assessment 2024/25 ATLAS in your workspaces without an additional request.

If you require access to additional years, please ask your Education Centre to contact the e-portfolio team with a year access request. Once granted, the new year will be immediately visible on your ATLAS dashboard.
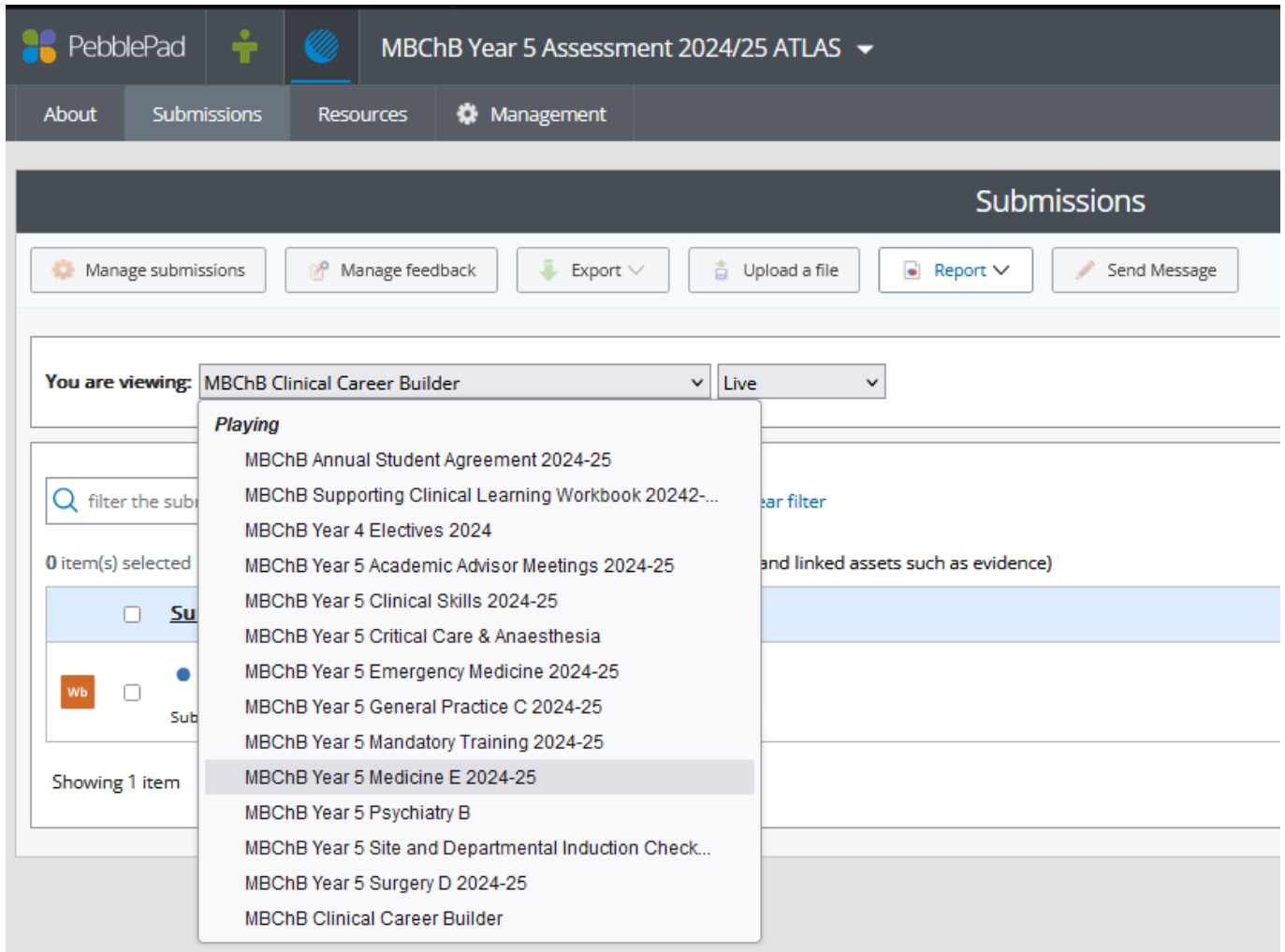
2.1.1 Finding a workbook of your student

Once you access MBChB Year 5 Assessment 2024/25 ATLAS, you will be taken to the following About page on ATLAS, the PebblePad assessor space:

From here, select 'Submissions' in the banner below the name of the workspace. You will see the screen shown below, with a 'You are viewing' dropdown. From this dropdown, please select the workbook you are looking for. For example, if you are a Medicine E supervisor, select 'MBChB Year 5 Medicine E 2024-25':

In the 'filter submissions' box:

Please type in the last name of the student you are looking for to find their Medicine C Placement Workbook. Clicking on it will open it in a new tab and allow you to review your student and provide the necessary feedback / information.

2.1.2 Student doctor workbook does not show when searching

We recommend using a student doctor's last name for searching, as they may have a chosen first name on PebblePad that is unknown to you.

However, if a student doctor's workbook is not showing even when searching with last name / email address, please contact eportfolio.mbchb@liverpool.ac.uk as soon as possible. This can happen if automatic sharing of the student's workbook with the assessor space, ATLAS, did not work correctly. Once notified, we will contact the affected student doctor directly with instructions on how to share their work with assessors.

2.1.3 Viewing content from previous academic years

If needed, you will be able to see the work of students you have supervised in previous academic years. While it does not happen often, it is a helpful feature – for example, you may have a student who is repeating a year, and you would like to check how their placement went last year to base a meeting discussion around it. On your dashboard, you will firstly see active workspaces:

Workspaces I am managing (14)	ⓘ

SETUP (0)	**ACTIVE (14)**	ARCHIVED

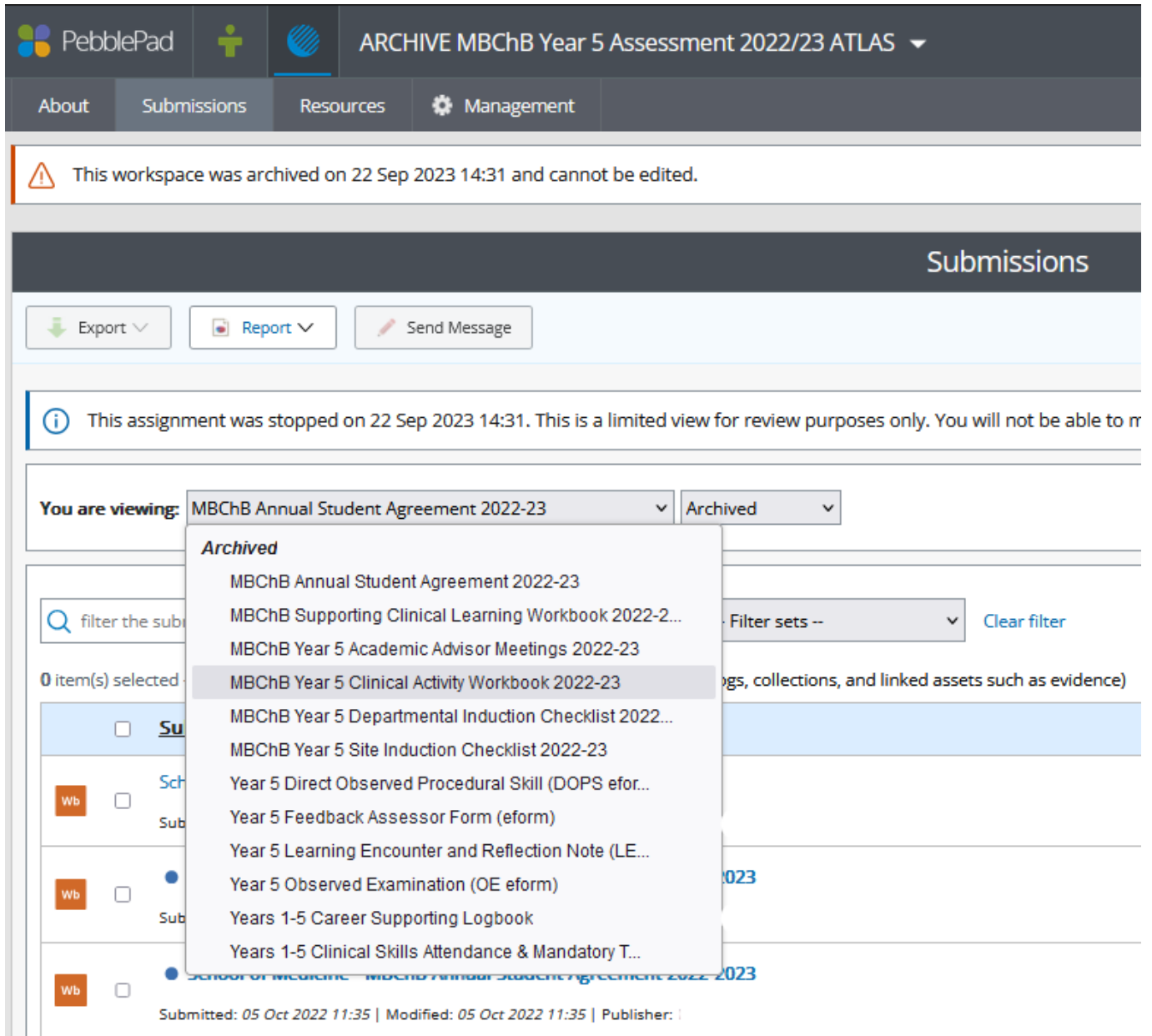|	
ACT Educational Teachers	⊕
ARCHIVE MBChB Year 1 Assessment 2023/24 ATLAS	⊕
ARCHIVE MBChB Year 2 Assessment 2023/24 ATLAS	⊕
ARCHIVE MBChB Year 3 Assessment 2023/24 ATLAS	⊕
ARCHIVE MBChB Year 4 Assessment 2023/24 ATLAS	⊕
ARCHIVE MBChB Year 5 Assessment 2023/24 ATLAS	⊕
Education Fellows	⊕
MBChB Graduate Entry Programme Good Doctor Assessment 2024-25	⊕
MBChB Year 1 Graduate Entry Programme Assessment 2024/25 ATLAS	⊕
MBChB Year 4 Assessment 2024/25 ATLAS	⊕

Prev | Page **1** of **2** | Next

However, you can click on 'Archived' and view older academic years that you have access to:

Workspaces I am managing (14)	ⓘ

SETUP (0)	ACTIVE (14)	**ARCHIVED**

ARCHIVE MBChB Year 1 Assessment 2022/23 ATLAS	⚙
ARCHIVE MBChB Year 1 Good Doctor Assessment 2022/23	⚙
ARCHIVE MBChB Year 1 Good Doctor Assessment 2023/24	⚙
ARCHIVE MBChB Year 2 Assessment 2022/23 ATLAS	⚙
ARCHIVE MBChB Year 3 Assessment 2022/23 ATLAS	⚙
ARCHIVE MBChB Year 4 Assessment 2022/23 ATLAS	⚙
ARCHIVE MBChB Year 5 Assessment 2022/23 ATLAS	⚙

Please note: the basics of navigation in archived workspaces are the same, however workbook structure might be different. In years before 24/25, there was a single workbook that contained all placements in separate tabs. Rather than select a placement from the ATLAS dropdown, you would need to select the Clinical activity workbook:

(Student details have been covered)

And once opened, head to the placement you are interested in:

3. Reviewing and completing the workbook placement pages

For this section, we will continue with using the Medicine E placement of a mock student doctor Charles Czalej as an example. Placements follow the same structure within PebblePad across the academic year.

Once you have found your student doctor, click on the workbook to open it:

You will then be taken to the introduction page of the placement.

Please note: The student doctor's name will always be displayed in the bottom left corner of the workbook. If you are supervising multiple student doctors, in this little section you can confirm that you are looking at both the correct placement, and the correct student:

The placement workbooks follow the structure of:

I)   Year and placement introduction pages

II)   Placement requirements, e.g. Case Based Discussions

III)   Student doctor's placement reflections

IV)   Educational Supervisor meetings

V)   Catch-up

VI)   Resit

To easily swap between tabs, please click on the contents button:
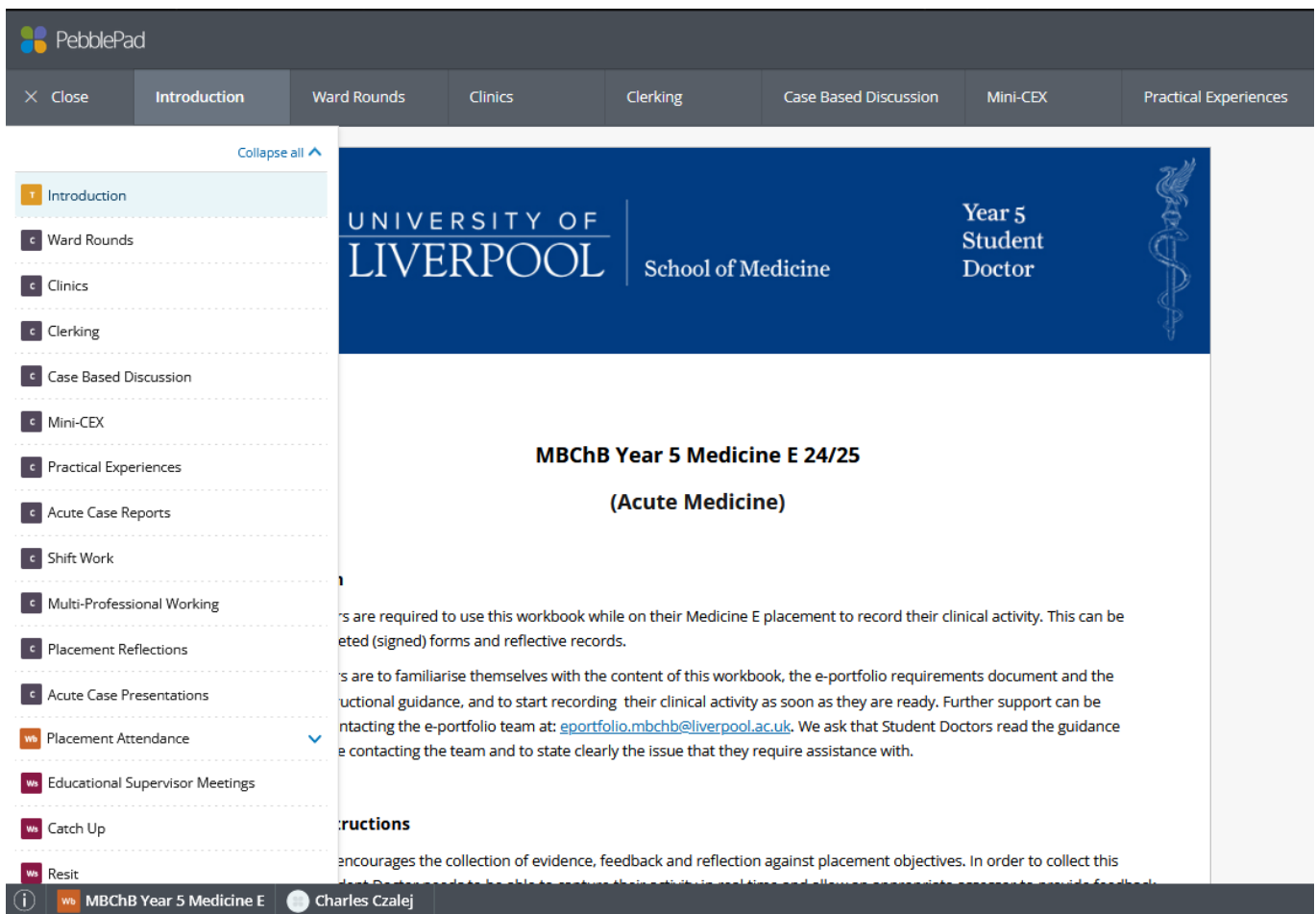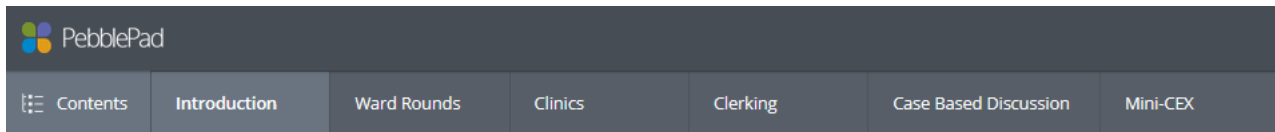
3.1 Saving and editing feedback

Before we move on to completing Educational Supervisor sections of the workbook, an essential part of that will be ensuring that your work has saved correctly. If it is not saved, it will unfortunately be lost.

3.1.1 Saving once / saving all

After completing a section, you will be able to press 'Save & Release' under that field:

TO BE COMPLETED BY: ANY ASSESSOR

First Meeting Summary- To be completed by Educational Supervisor

Educational Supervisor guidance: in order to save all inputs rather than save one by one, please select 'Assessor field actions' in the top left of the workbook and press 'Save & Release'.

Meeting summary to be completed at the first Educational Supervisor meeting. Please comment on how the student doctor's objectives could be achieved on this placement. Please also note any items from the Departmental Induction Checklist which were discussed during the meeting.

| Paragraph ∨ | A⃗ ∨ | AI ∨ | **B** | *I* | U̲ | S̶ | x² | x₂ | I⃗ₓ | ∂ | ≔ ∨ | ≔ ∨ | ⇤ | ⇥ | ≡ ∨ | ⋮ |

Example

Word count: 1

Save & Release

This will save the section it appears under. However, a particularly useful feature is the 'Save all'. **To save all your work on a single page**, please select 'Assessor field actions' in the top left:

PebblePad

| Contents | ‹ ment Reflections | Acute Case Presentations | Placement Attendance ∨ | Educational Supervisor Me… | Catch Up |

Assessor field actions ∨

any specific clinics or theatre sessions. This information will form the basis of your discussion at your meeting and is a mandatory requirement to be completed by the student, prior to the meeting.

Word count: 0 (Min 100)

TO BE COMPLETED BY: ANY ASSESSOR

First Meeting Summary- To be completed by Educational Supervisor

Educational Supervisor guidance: in order to save all inputs rather than save one by one, please select 'Assessor field actions' in the top left of the workbook and press 'Save & Release'.

Meeting summary to be completed at the first Educational Supervisor meeting. Please comment on how the student doctor's objectives could be achieved on this placement. Please also note any items from the Departmental Induction Checklist which were discussed during the meeting.
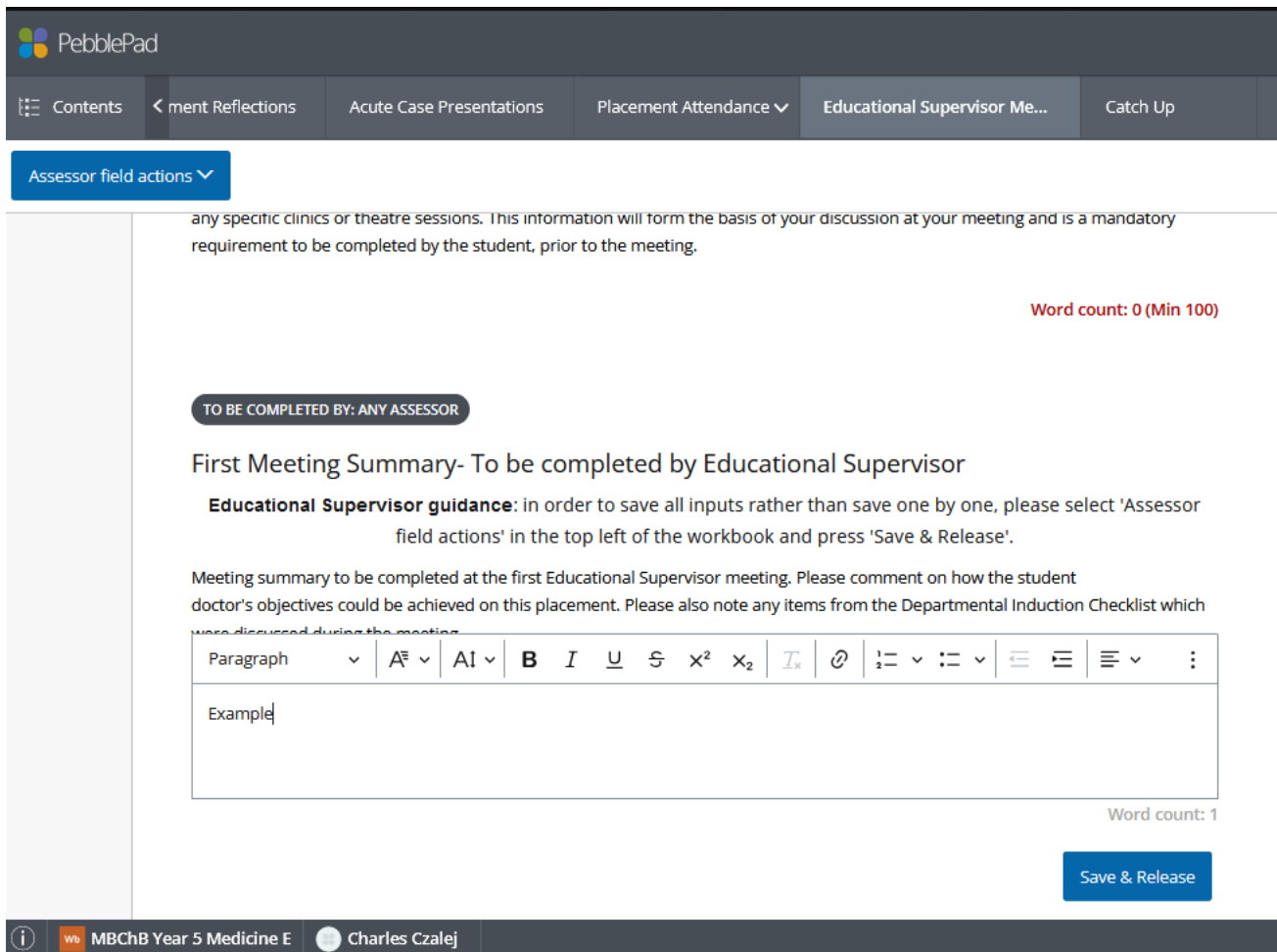
| Paragraph ∨ | A⃗ ∨ | AI ∨ | **B** | *I* | U̲ | S̶ | x² | x₂ | I⃗ₓ | ∂ | ≔ ∨ | ≔ ∨ | ⇤ | ⇥ | ≡ ∨ | ⋮ |

Example

Word count: 1

Save & Release

Wb MBChB Year 5 Medicine E   Charles Czalej

And select 'Save and release' there:
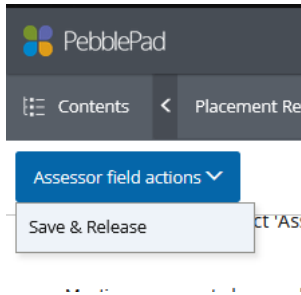
3.1.2 Editing or removing feedback

If you have made a mistake, or simply wish to edit previously provided feedback / selected grade, click the three dots in the top right corner of the field you wish to change:

And then 'Add new feedback' or 'Edit existing':

The previous versions of your feedback will be stored in assessor history.

Because of that, **if you wish to completely remove previously left feedback**, for example if it was left on a wrong workbook by accident, you will first need to click on 'Recall assessor field' and then 'Confirm recall':

TO BE COMPLETED BY: ANY ASSESSOR   Released 🟢 ⋮

First Meeting Summary- To be completed by Educational Superviso| ↺ Confirm recall | Cancel

Educational Supervisor guidance: in order to save all inputs rather than save one by   💬 Add new feedback
field actions' in the top left of the workbook and press 'Save & R
                                                                              💬 Edit existing feedback
Meeting summary to be completed at the first Educational Supervisor meeting. Please comment on
doctor's objectives could be achieved on this placement. Please also note any items from the Departmental Induction Checklist which were discussed during the meeting.

Example
                                                                              Word count: 1

⠿ Monday, 02 September 2024 11:44 by Charles Czalej

The section will then show as 'Unreleased' with a red dot, and you will have new options when clicking on the 3-dot menu:

TO BE COMPLETED BY: ANY ASSESSOR   Unreleased 🔴 ⋮

First Meeting Summary- To be completed by Educational Supervisor

Educational Supervisor guidance: in order to save all inputs rather than save one by one, please select 'Assessor field actions' in the top left of the workbook and press 'Save & Release'.

Meeting summary to be completed at the first Educational Supervisor meeting. Please comment on how the student doctor's objectives could be achieved on this placement. Please also note any items from the Departmental Induction Checklist which were discussed during the meeting.

Example
                                                                              Word count: 1

⠿ Monday, 02 September 2024 11:44 by Charles Czalej

An option to delete the feedback will be present:

Please note, this will delete the latest feedback. If you have made multiple changes that were subsequently saved, you may need to repeat the delete action.

3.1.3   Unsaved changes pop-up

Please ensure you pay attention to the following pop-up message:

It will appear if you have not saved your work and attempt to move to a different section / close the page. If you see it, please use the save all feature. When you attempt to move away from the page again, it should not appear, thus ensuring all your work is saved.

3.2   Completing meetings

Please click on 'Educational Supervisor Meetings' either from the contents tab, or from the banner.

You will be presented with all the meetings that are due to take place during the selected placement. The sections due to be completed by a supervisor are marked as 'To be completed by: Educational Supervisor' or can sometimes appear as 'To be completed by: any assessor'.

They will appear as text fields to you, and you simply click on them to begin writing. Sections to be completed by the student doctor will not be editable to you:

TO BE COMPLETED BY: ANY ASSESSOR

First Meeting Summary- To be completed by Educational Supervisor

Educational Supervisor guidance: in order to save all inputs rather than save one by one, please select 'Assessor field actions' in the top left of the workbook and press 'Save & Release'.
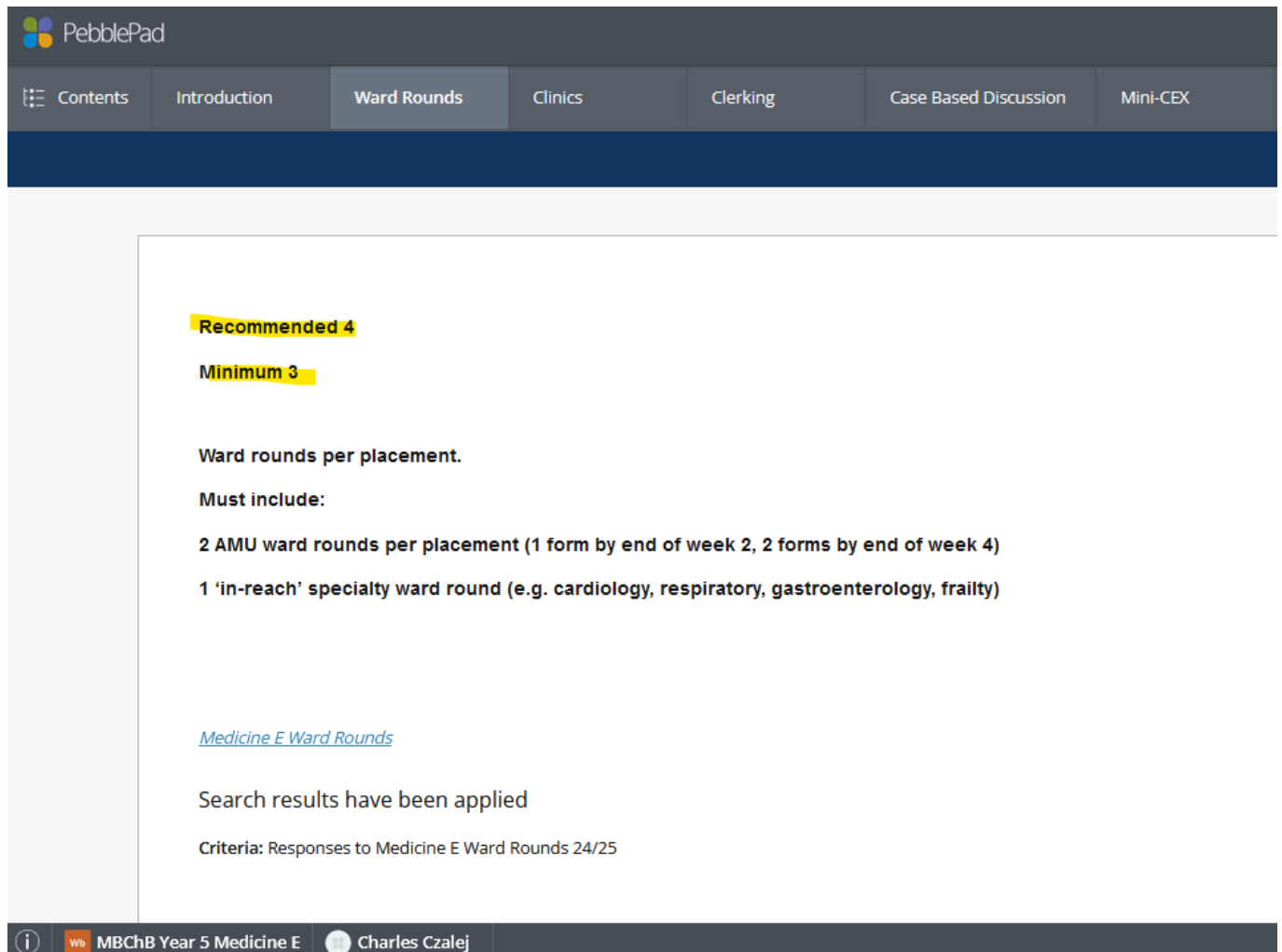
Meeting summary to be completed at the first Educational Supervisor meeting. Please comment on how the student doctor's objectives could be achieved on this placement. Please also note any items from the Departmental Induction Checklist which were discussed during the meeting.

Word count: 0

Save & Release

3.3 Reviewing placement requirements

The structure of each placement workbook is set by the placement and year requirements. If there is a recommended and / or minimum number of a particular activity, you will be able to see that clarified in the corresponding section:

Recommended 4

Minimum 3

Ward rounds per placement.

Must include:

2 AMU ward rounds per placement (1 form by end of week 2, 2 forms by end of week 4)

1 'in-reach' specialty ward round (e.g. cardiology, respiratory, gastroenterology, frailty)

Medicine E Ward Rounds

Search results have been applied

Criteria: Responses to Medicine E Ward Rounds 24/25

MBChB Year 5 Medicine E — Charles Czalej

3.4 Providing a placement outcome

To provide a placement outcome, select the grade corresponding to the student doctor's efforts during the placement, and click 'Save & Release'.

Please ensure that you familiarise yourself with the outcome rubric. While it may look familiar to you, the contents have been updated for 2024-25:
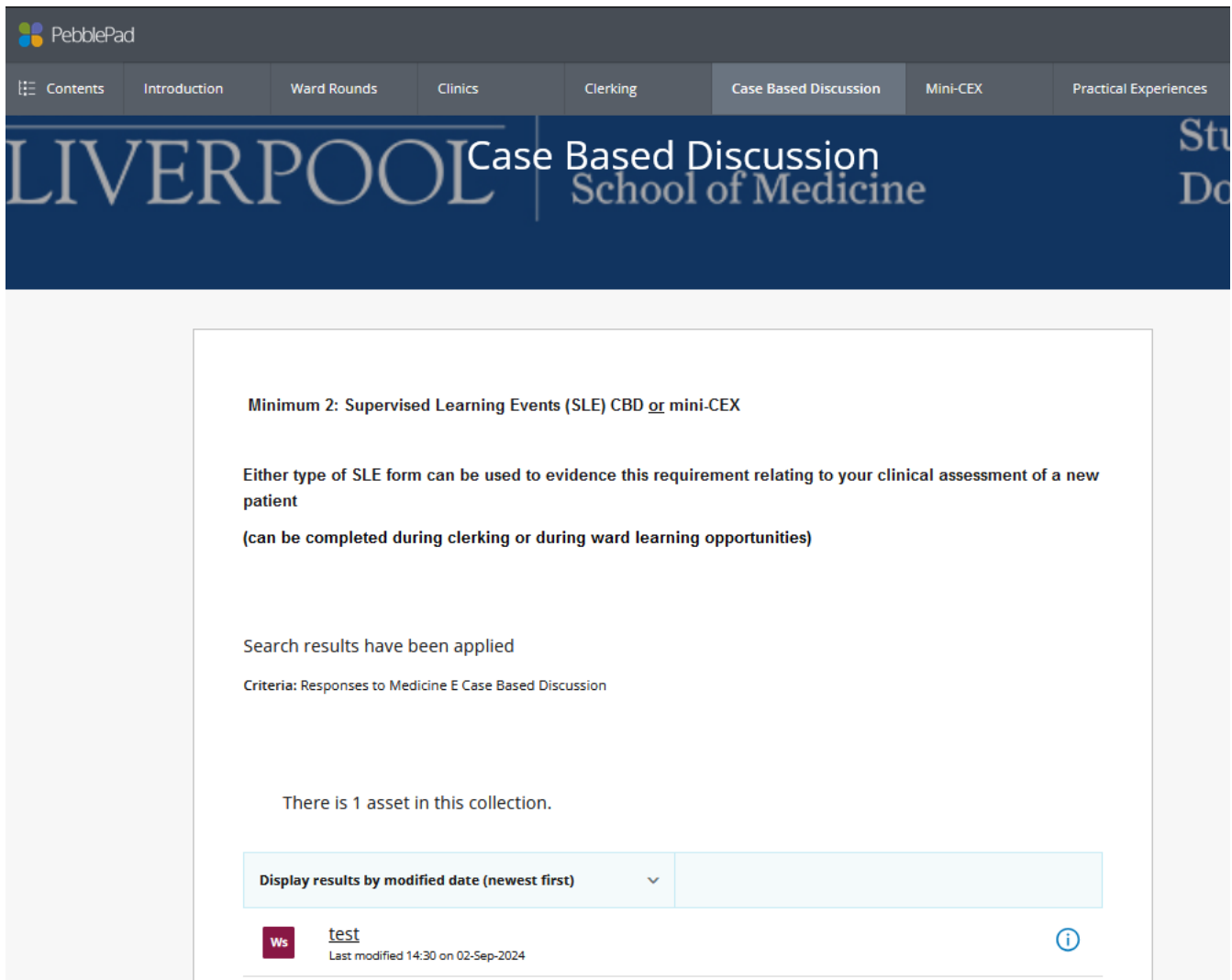
Placement Outcome

	Unsatisfactory	Borderline	Satisfactory	Good	Excellent
This student doctor has met the requirement of the placement	Has **not demonstrated** a professional and responsible manner, and there are notable concerns OR **has not completed** a **minimum level** of placement requirements	Has **minimally demonstrated** a professional and responsible manner with some minor concerns OR has completed the **minimum level** of placement requirements* but with very limited or no evidence of critical self-reflection on learning and development	Has **demonstrated** a professional and responsible manner, with a commitment to quality of care AND has completed the **minimum level** of placement requirements* with insightful critical self-reflection on learning and development	Has **demonstrated** a professional and responsible manner, with a commitment to quality of care AND has completed the **recommended level** of placement requirements* with insightful critical self-reflection on learning and development	*An excellent student will be able to demonstrate all of the following:* Has consistently **demonstrated** a professional and responsible manner, with an **exemplary** commitment to quality of care AND has **exceeded the recommended level** of placement requirements* with consistently insightful critical self-reflection on learning and development, integrating feedback to address strengths and weaknesses in clinical skills, knowledge, and professional behaviours

Save & Release

3.4.1 Collections

Placement requirements that follow the same format, for example Case Based Discussions, have an automatic submission for students and appear as below:

If a student doctor completed a Case Based Discussion, it will automatically transfer to this section of their workbook. To review the form, click on its' title, in this example 'test':

The student doctor's completed form will be fully visible to you for review. The process follows the same structure for all placements across the year.

3.4.2 Manual attachments

Attachments that can vary in format rely on a manual submission from the student doctor. The most common form of these across Year 5 are the attachments confirming placement attendance.

Manual attachments will display a page icon. To open them, click on it:

Week 1 Timetable

Please download your weekly timeable from Timetabler for this placement week and attach it below. You will be able to do this by clicking the three dots at the top right of the screen on Timetabler and then 'download timetable'.

[+ Add...] [📄 1]

And it will open in a sliding menu to the right, where if you click on its' title, it will open in a new tab the same as any other attachment:
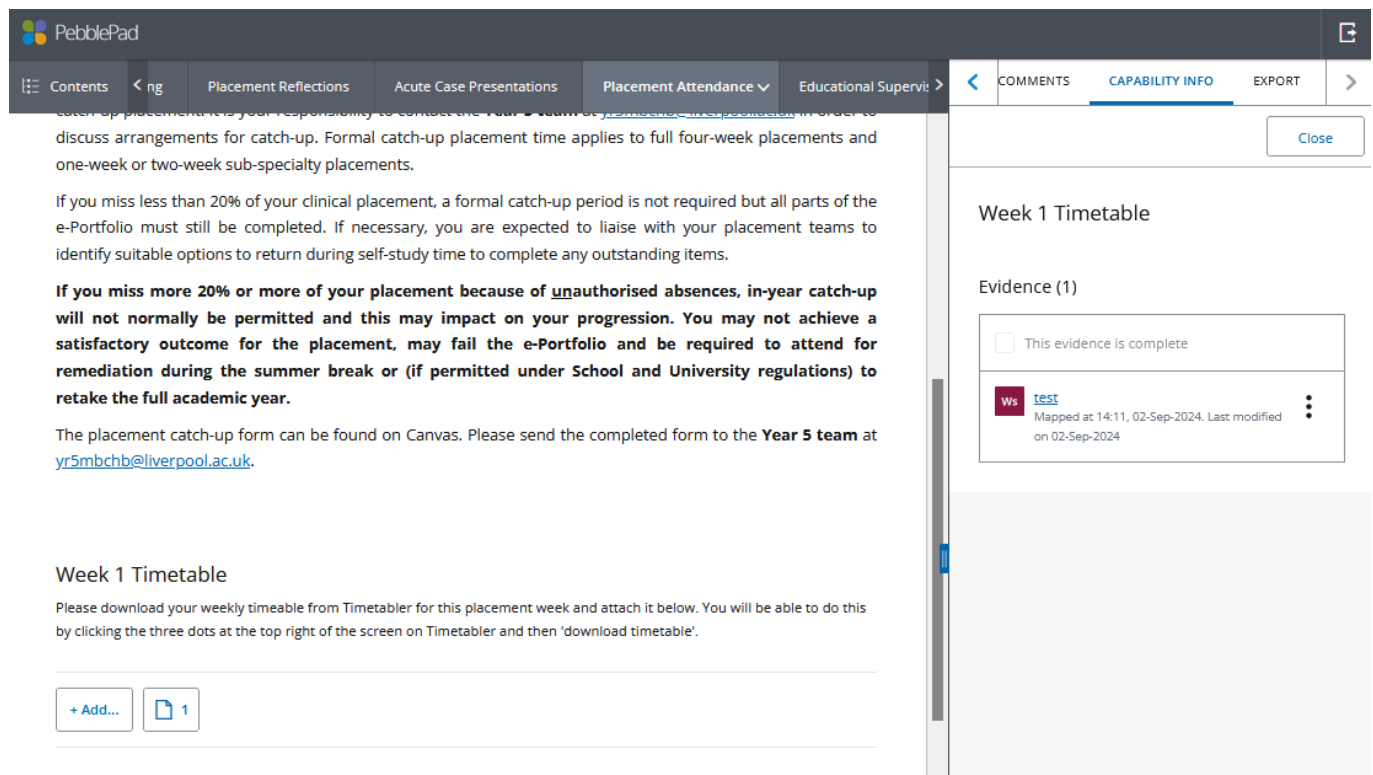

4. Clinical Skills (DOPS) forms

Student doctors are required to record evidence of performing a clinical skill (mandatory and recommended skills) using a **Direct Observed Procedural Skill' (DOPS) form** on their mobile device called (PebblePocket). The number of DOPS that student doctors will need to achieve in an academic year and specific types are outlined to them in the yearly requirements document.

The completed DOPS forms are then visible in both the placement workbooks, and overall in the Clinical Skills workbook:

1. DOPS completed during a placement can be found as a manual attachment (student doctors need to ensure to input them) in the final meeting section of a placement workbook:
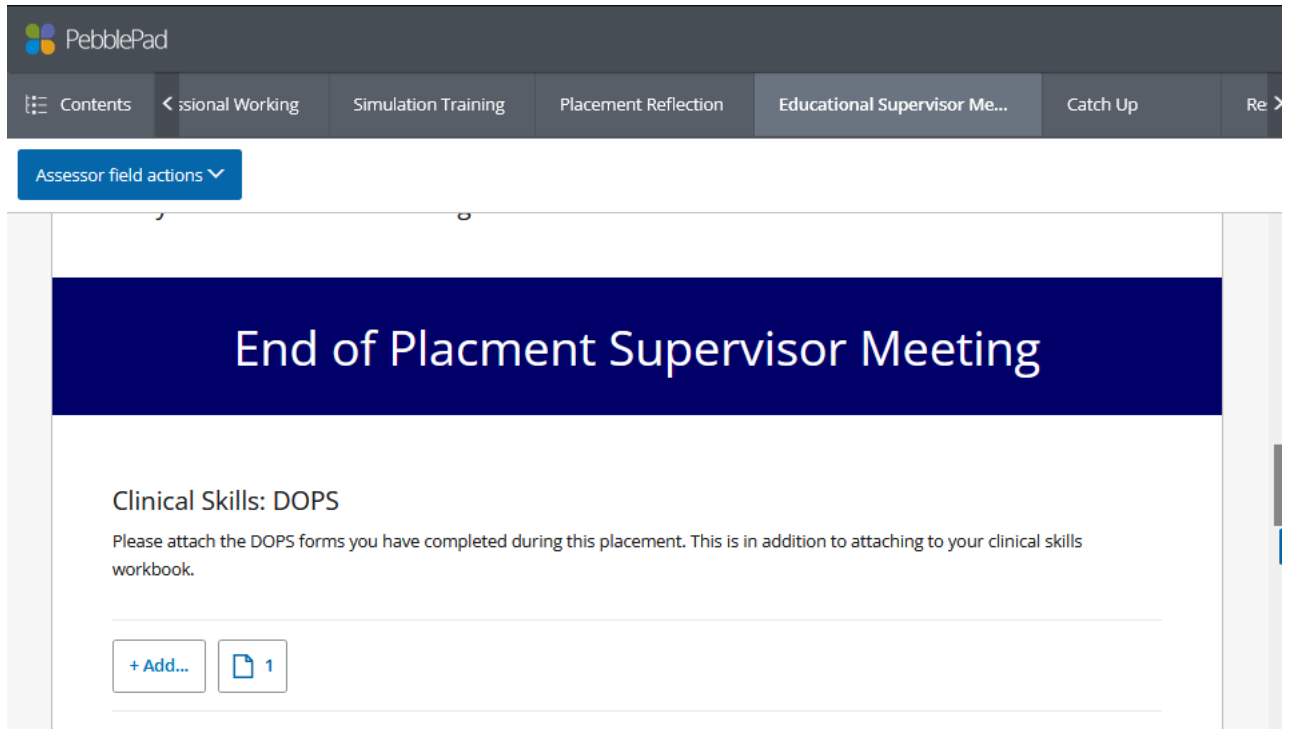
2. All DOPS completed in the academic year can be found in the MBChB Year 5 Clinical Skills Workbook 2024-25, which you access via the same dropdown as selecting a placement to look at:
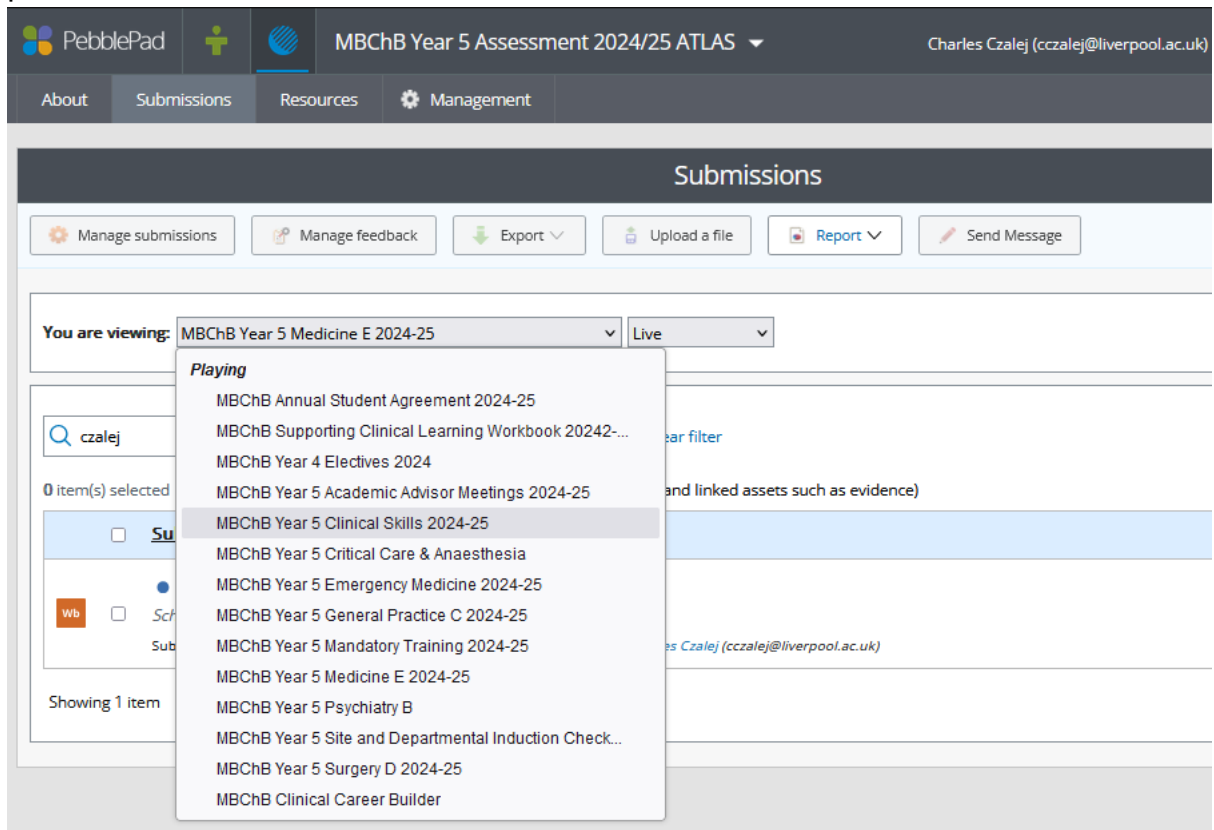
The process is the same, simply search for the student and click on their workbook to open it:
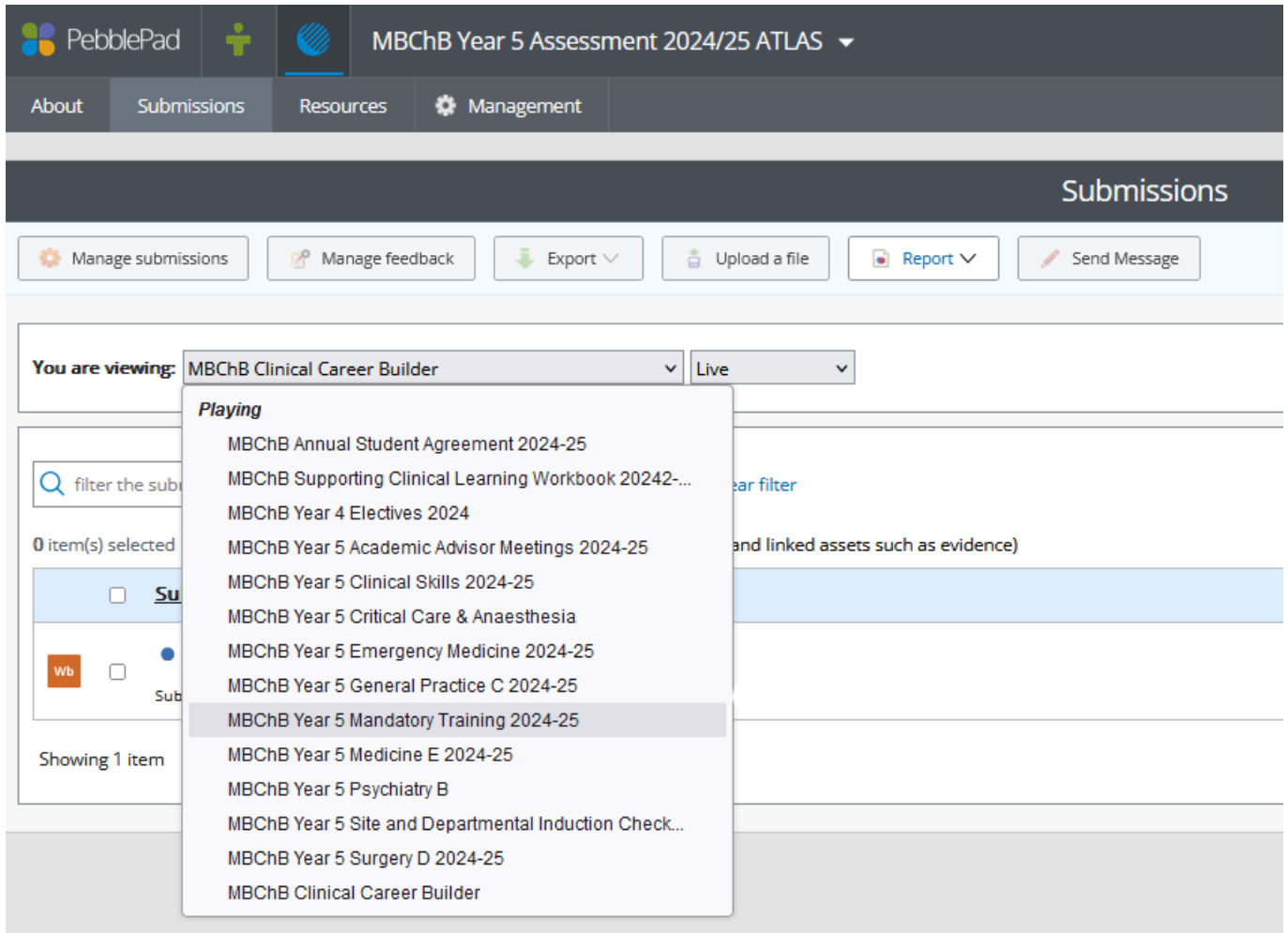
Note: If a student doctor <u>observes</u> a DOPS, no assessor feedback or sign off is required.

5. Mandatory certificates

Student doctors are expected to complete and attach specific e-learning certificates throughout the course of the academic year. Although you are welcome to view these, **you are not required to check that these have been completed in your role as an Educational Supervisor.**

If you wish to view them, head back to ATLAS submissions as if you were selecting a placement workbook and select 'MBChB Year 5 Mandatory Training 2024-25' from the dropdown. The process of searching for a name, opening a workbook, and clicking on attached certificates to see how they look like repeats the same as if you were checking placement requirements:

6. Help and Support

6.1 Logging out

Always log out of the e-portfolio system correctly by clicking on the above button. If you do not log out correctly you run the risk of losing the feedback you have added to the workbook. Failure to log out correctly can also cause the system to create a duplicate workbook when the student doctor next logs in, which can cause problems further down the line.
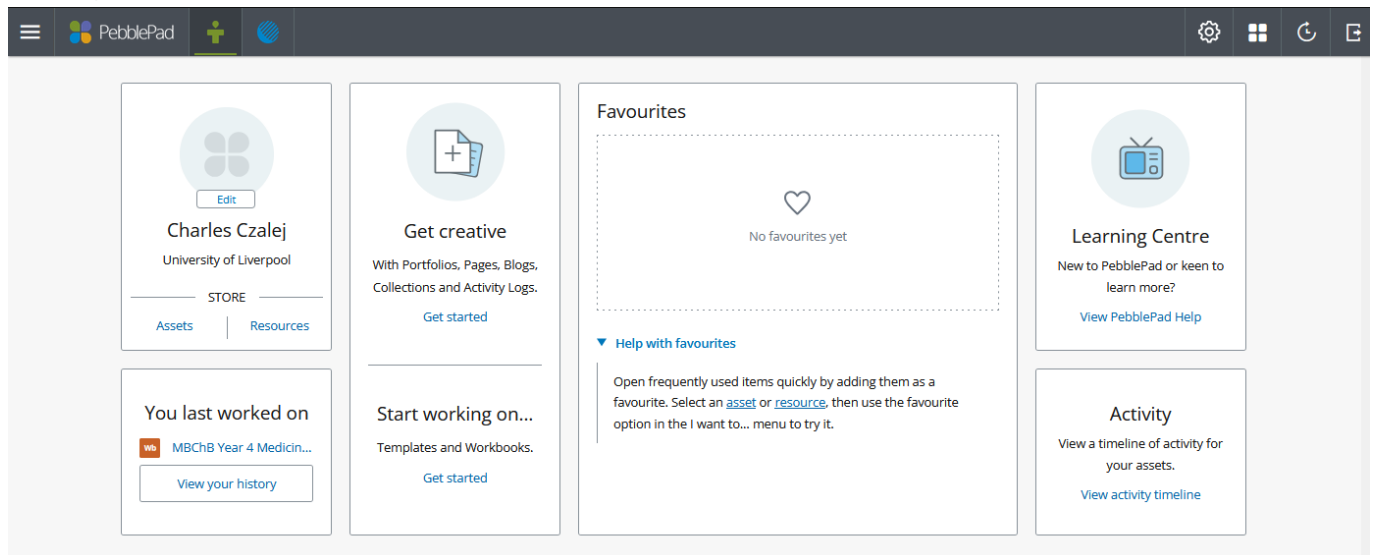
To ensure everything runs smoothly, we recommend using the 'save all' feature, and then clicking log out at the end of each reviewing session.

6.2 How do student doctors record clinical activity on placement?

Student doctors record their clinical activity on placement using the PebblePocket App on their mobile device. The completed forms are then automatically placed into 'Collections' if they correspond to a specific, often repeated, activity – for example Case Based Discussions. Or alternatively, unique forms are completed by the student on either PebblePocket or desktop PebblePad, and then uploaded manually to the specific section, e.g. the timetables in placement attendance.

6.3 Problems logging into the system

If you follow the above guidance on logging into the system and find yourself on the below page, simply click the ATLAS icon, located on the top left of the screen. You will then be taken to the Managers Dashboard screen, where you can click on the workspace you need access to.

ATLAS icon

Selecting the ATLAS icon will take you to the familiar screen used throughout this guide:
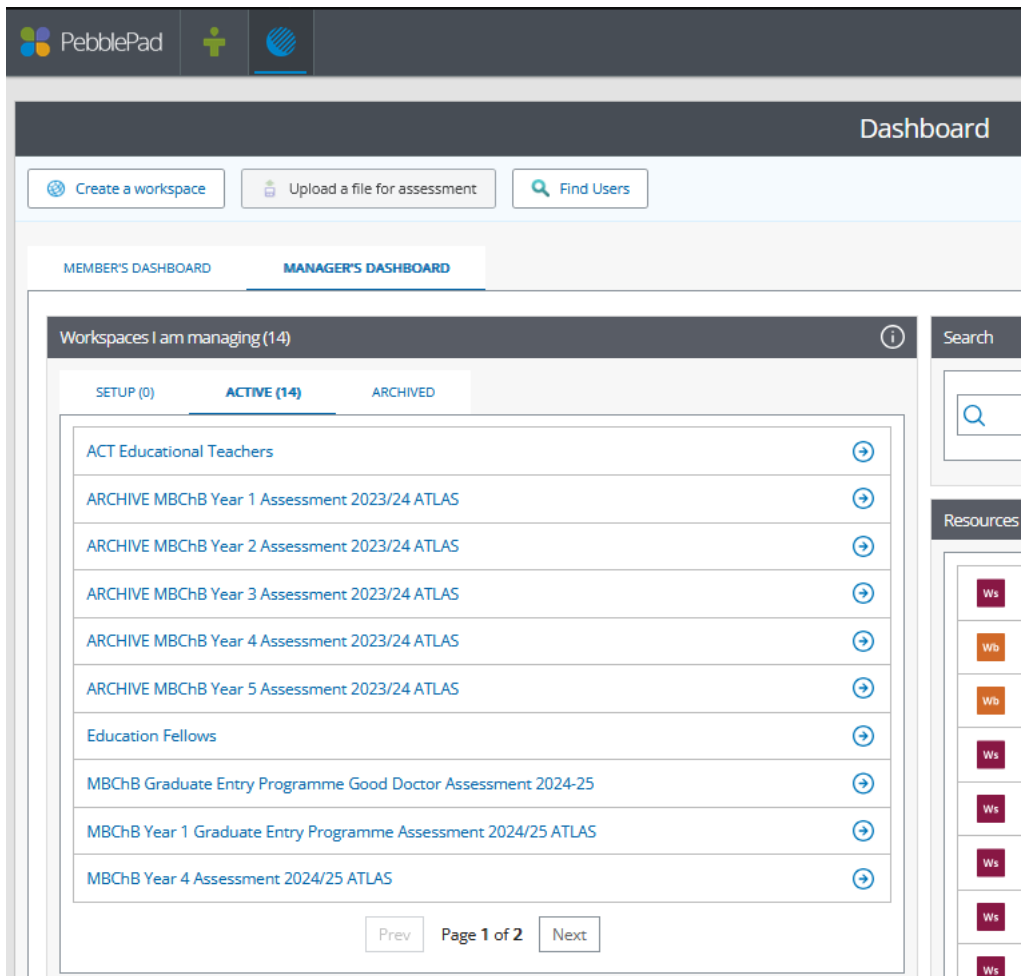
6.4 Pop-up Blockers

If the e-portfolio does not open in a new window, ensure any pop-up blockers are disabled. If you require some assistance with this, please follow this link to view the most common ways to disable popup blockers:

https://www.wikihow.com/Allow-Pop–ups [**How to Disable Pop-up Blockers**]

6.5 Merge account message

External Assessors who have External accounts from more than one organisation can now merge their accounts so that they can use a single login to access PebblePad and then choose the organisation that they want to view. If when you log into the e-portfolio you see the below message, click '**Continue without merging**' and complete what you need to on the e-portfolio.
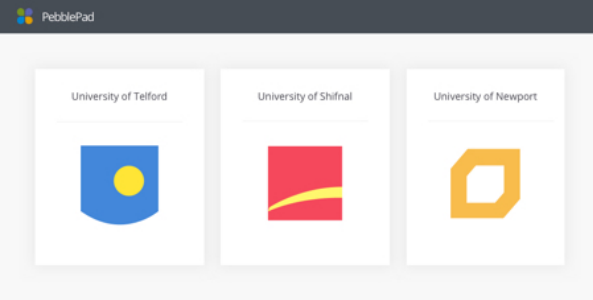
If you wish to merge your accounts, please contact the E-portfolio Administrator who will send you guidance on how to do this.

6.6 Useful Contacts

Title	Name	Email
Year 5 Curriculum queries	Mr Elliot Lee	yr5mbchb@liverpool.ac.uk
E-portfolio queries	Mrs Faye Unsworth, Mr Charles Czalej, and Mrs Angela Bates	eportfolio.mbchb@liverpool.ac.uk
LTSO team	Mrs Michelle Szkudlapski & Mrs Ruth O'Dea	ltsomedicine@liverpool.ac.uk

Contact the E-portfolio Administrator if you find any digital content difficult or impossible to use, either directly or with an assistive technology such as a screen reader.

Contact details for all teams and individual staff can be found on the School website. [www.liverpool.ac.uk/medicine/contact-us/email/].

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www.liverpool.ac.uk/medicine