



Feidhmeannacht na Seirbhíse Sláinte
Health Service Executive

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E-Portfolio Supervising Clinician/Consultant User Guide

Supervising Clinician / Consultant Validation User Guide

E-Portfolio

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Section 1 – Introduction to E-Portfolio

1.1 Glossary of Terms

Term	Description
NDTP	National Doctors Training and Planning
NER Portal	National Employment Record Portal.
E-Portfolio	This is the module that is available to NCHDs where they can log their clinical and educational activities.
Logbook	This is the PDF document that can be created which included details from the records that are created in the E-Portfolio.
SNOMED	This is a list of clinical terminology used to describe clinical procedures. For more information please see the link https://www.ehealthireland.ie/our-team/enterprise-architecture/snomed%20ct/
Supervising Clinician/Consultant	This is the name of the clinician/consultant that an NCHD will seek validation for a record from. They must have been present at the time of the procedure.

1.2 Introduction

NCHDs have access to a National Employment Record (NER), which provides a central location for pre-employment documentation to be stored and accessed by their employer.

The E-Portfolio module has been developed, and added to the NER, to give NCHDs who are not associated with a Postgraduate Medical Training Body and do not have access to a formal Logbook the opportunity to record any clinical or professional development activities they have undertaken and have, where applicable this experience validated.

As part of the E-Portfolio, NCHDs may seek verification of relevant records from a Supervising Clinician/Consultant, once this activity has occurred within the last six month period. Information on these records will be visible to the nominated Supervising Clinician/Consultant the NCHD choose to send this data to. The Supervising Clinician/Consultant will access the data via a secure link sent by email. The Supervising Clinician/Consultant will be able to view this data until it has been processed by them or six months has elapsed since the activity date, whichever is the sooner. It is the responsibility of the NCHD to ensure they select the correct IMC number and email address for the nominated Supervising Clinician/Consultant. This guide was developed for Supervising Clinicians/Consultants and explains how to manage this process.

This module is available to all NCHDs who have an NER account, however it is not intended to replace the Logbooks developed by Training bodies and therefore should not be used in place of those provided by a training body. Within the E Portfolio there are no mandatory or specific sections required for completion. NCHDs are responsible for the content contained within their E-Portfolio. This E-Portfolio is not endorsed by a Postgraduate Medical Training Body and thus does not lead to certification or guarantee eligibility to the Irish Medical Council's Specialist Division of the Register.

For further details on the E-Portfolio module, FAQs and its terms and conditions please visit www.hse.ie/doctors

Section 2 – Categories for Validation

2.1 Categories for Validation

The E-Portfolio module allows NCHDs to submit the following categories of activities to their Supervising Clinician/Consultant for validation:

- Procedures
- Assessments
- Training Plan & Review
- Education & Personal Development – Leadership & Management Experience

NCHDs can only seek validation of an activity that has taken place within the past six months. Validation of an activity must be completed by the Supervising Clinician/Consultant within six months of the activity date or the verification request will expire.

Supervising Clinicians / Consultants will receive a link, via email, to validate activities once a week, on a Monday, provided there are valid activities to be reviewed. A unique link will be provided in this email which will display the list of activities that have been sent to you for review. Please note you will **not** receive separate emails for each individual activity sent to you. You will **not** require a username/password to access these activities; however, you will be required to enter your IMC number for security reasons.


Important:

NCHDs are able to create, download and share a PDF logbook including the activities they have logged on their E-Portfolio. Records that have been validated by a Supervising Clinician/Consultant will display with the following details:

1. Supervising Clinician/Consultant Email
2. Supervising Clinician/Consultant IMC Number
3. Supervising Clinician/Consultant Name
4. Supervising Clinician/Consultant Register Type
5. Supervising Clinician/Consultant Specialty
6. Supervising Clinician/Consultant Division
7. Supervising Clinician/Consultant Comments (If applicable)

As shown in Figure 1, these details will be shaded in blue and italicised. Activities that are awaiting your review or those that you have selected as “*Unable to Validate*” will **not** display the above details.

Sample pages from an E-Portfolio Logbook are shown below:

 E-Portfolio Logbook: 01/01/0001

The NER E-Portfolio provides a tool for all NCHDs to log their clinical and professional development activities. Within the E-Portfolio, NCHDs can seek validation from their Supervising Clinician / Consultant for specific clinical experience where applicable. Validated activities will display the details and feedback of the Supervising Clinician / Consultant. Only records in the following sections can be sent for review provided they have an activity date within the last 6 months:


- Procedures
- Assessments
- Training Plan & Review
- Education and Clinical Experience – Leadership & Management


Records within the logbook will be labelled with one of the following statuses:

- **Logged** – The record has been saved by the NCHD but has not been sent for review by a Supervising Clinician / Consultant. The NCHD has the ability to edit these records with status logged.
- **Awaiting Review** – The record has been sent to the Supervising Clinician / Consultant for review and the NCHD is awaiting their feedback.
- **Reviewed – Validated** – The record has been reviewed by the Supervising Clinician / Consultant and the information has been verified and supported by the Supervising Clinician / Consultant. The NCHD will not be able to make any further changes to this record. Validated records will display the details of the Supervising Clinician / Consultant and will be highlighted in light blue with an italic font to easily distinguish the Supervising Clinicians / consultants feedback from the NCHDs record.
- **Reviewed – Unable to Validate** – The record has been reviewed by the Supervising Clinician / Consultant and the information has not been verified or supported by the Supervising Clinician / Consultant. They have considered the information to be inaccurate. NCHDs will no longer be able to edit these records.

This E-Portfolio does not replicate those offered by the Irish Postgraduate Medical Training Bodies. Within the E-Portfolio there are no mandatory or specific sections required for completion. NCHDs are responsible for the content contained within their E-Portfolio. This E-Portfolio is not endorsed by a Postgraduate Medical Training Body or the Irish Medical Council.

For further details on how to use the E-Portfolio and its terms and conditions please visit <https://www.hse.ie/doctors>

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 E-Portfolio Logbook:

Title: Anastomosis of stomach

Procedure Type	Emergency
Activity Date	01/03/2021
Level Of Supervision	Independent without supervision
Details	test
Status	Reviewed - Validated
Clinical Supervisor / Consultant Email	
Clinical Supervisor / Consultant IMC	
Clinical Supervisor / Consultant Name	
Clinical Supervisor / Consultant Register Type	Specialist Registration
Clinical Supervisor / Consultant Speciality	Anaesthesiology
Clinical Supervisor / Consultant Division	Anaesthesiology
Validation Date	01/03/2021
Consultant's Comments	

Title: Abdominal cavity operation

Procedure Type	Test 1
Activity Date	01/03/2021
Level Of Supervision	Independent with supervision
Details	test filters
Status	Logged

Title: CT of nervous system

Procedure Type	Scheduled
Activity Date	26/02/2021
Level Of Supervision	Independent with supervision
Details	test
Status	Logged


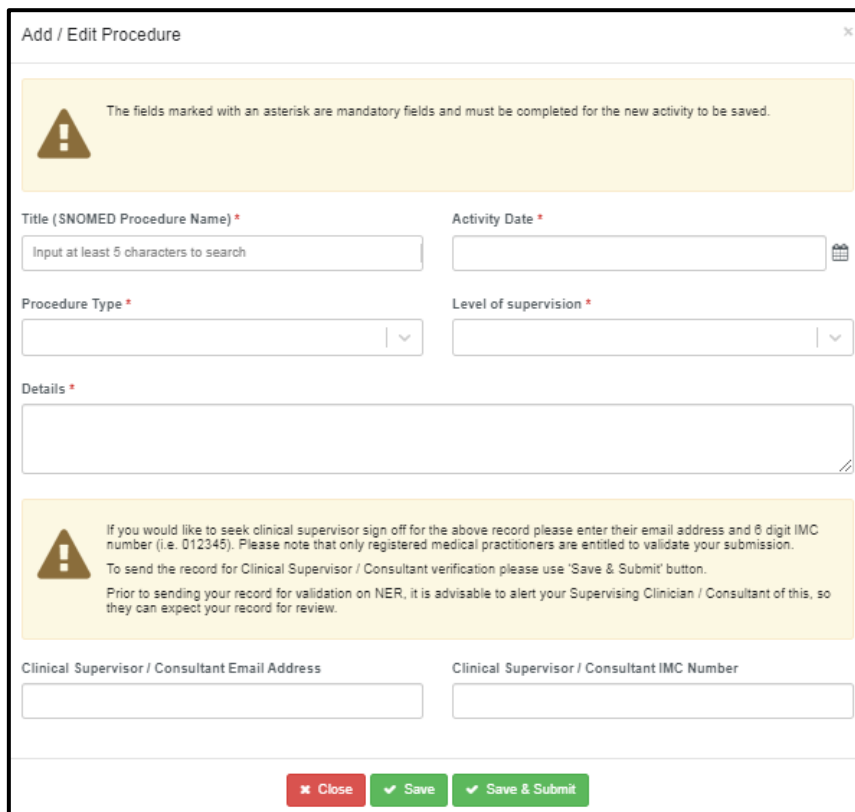
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Figure 1: Sample pages from an E-Portfolio Logbook. Only Validated activities will display Supervising Clinician/Consultant Details.

2.2 Procedures

An NCHD can enter details of a procedure they have taken part in by using the form shown in Figure 2.



Add / Edit Procedure

The fields marked with an asterisk are mandatory fields and must be completed for the new activity to be saved.

Title (SNOMED Procedure Name) * **Activity Date ***

Input at least 5 characters to search

Procedure Type * **Level of supervision ***

Details *

If you would like to seek clinical supervisor sign off for the above record please enter their email address and 6 digit IMC number (i.e. 012345). Please note that only registered medical practitioners are entitled to validate your submission. To send the record for Clinical Supervisor / Consultant verification please use 'Save & Submit' button. Prior to sending your record for validation on NER, it is advisable to alert your Supervising Clinician / Consultant of this, so they can expect your record for review.

Clinical Supervisor / Consultant Email Address **Clinical Supervisor / Consultant IMC Number**

Figure 2: Adding/Editing a Procedure - NCHD

NCHDs must enter the following mandatory information for a Procedures record:

1. Title (SNOMED Procedure Name):

The “Title” field will allow NCHDs to search procedure names from the SNOMED dictionary. Only titles from the SNOMED dictionary can be selected.

2. Activity Date:

Date the procedure took place

3. Procedure Type:

NCHDs should choose one of the following:

- Emergency
- Scheduled

4. Level of Supervision:

NCHDs should choose one of the following:

- Assisted
- Independent with Supervision
- Independent without Supervision
- Observed

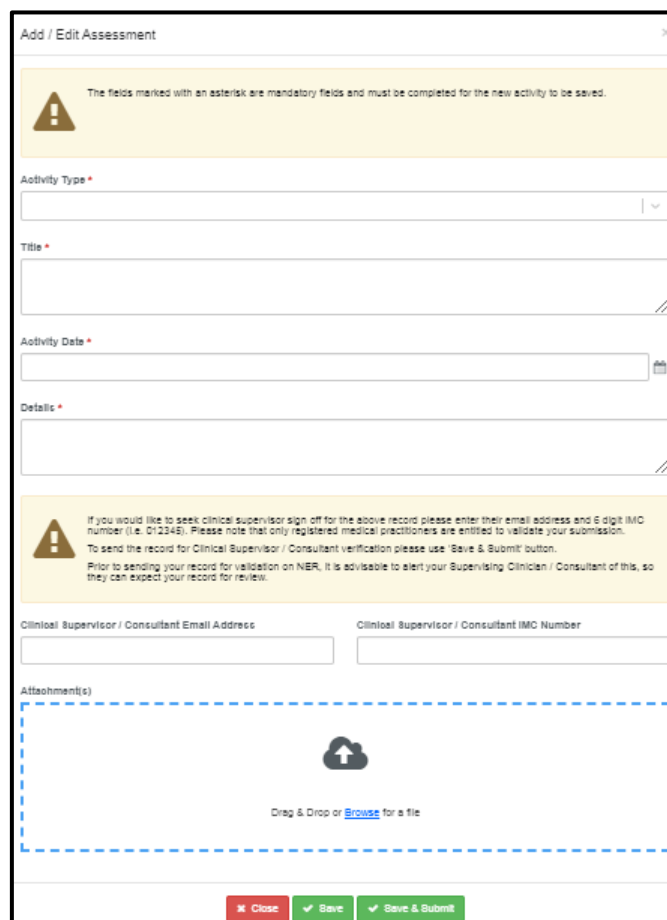
5. Details:

NCHD can give further details about the Procedure

NCHDs can submit the record to their supervising clinician/consultant for validation by entering the Clinician/Consultants work email address, IMC number and clicking ‘Save and Submit’.

2.3 Assessment

An NCHD can enter details of an Assessment they have taken by using the form shown in Figure 3.



The form is titled 'Add / Edit Assessment'. It contains a warning message: 'The fields marked with an asterisk are mandatory fields and must be completed for the new activity to be saved.' The form includes the following fields:

- Activity Type ***: A dropdown menu.
- Title ***: A text input field.
- Activity Date ***: A date picker.
- Details ***: A large text area.
- Clinical Supervisor / Consultant Email Address**: A text input field.
- Clinical Supervisor / Consultant IMC Number**: A text input field.
- Attachment(s)**: A dashed box containing a cloud icon and the text 'Drag & Drop or [Browse](#) for a file'.

At the bottom of the form are three buttons: 'Close', 'Save', and 'Save & Submit'.

Figure 3: Adding/Editing an Assessment - NCHD

NCHDs must enter the following mandatory information for an Assessments record:

1. Activity Type:

NCHDs should choose one of the following:

- Case Discussion
- Directly Observed Procedure
- Mini CEX (Mini Clinical Examination)
- Teaching Assessment

2. Title:

NCHDs can create a title to describe the Assessment

3. Activity Date:

Date of the Assessment

4. Details:

NCHD can give further details about the Assessment

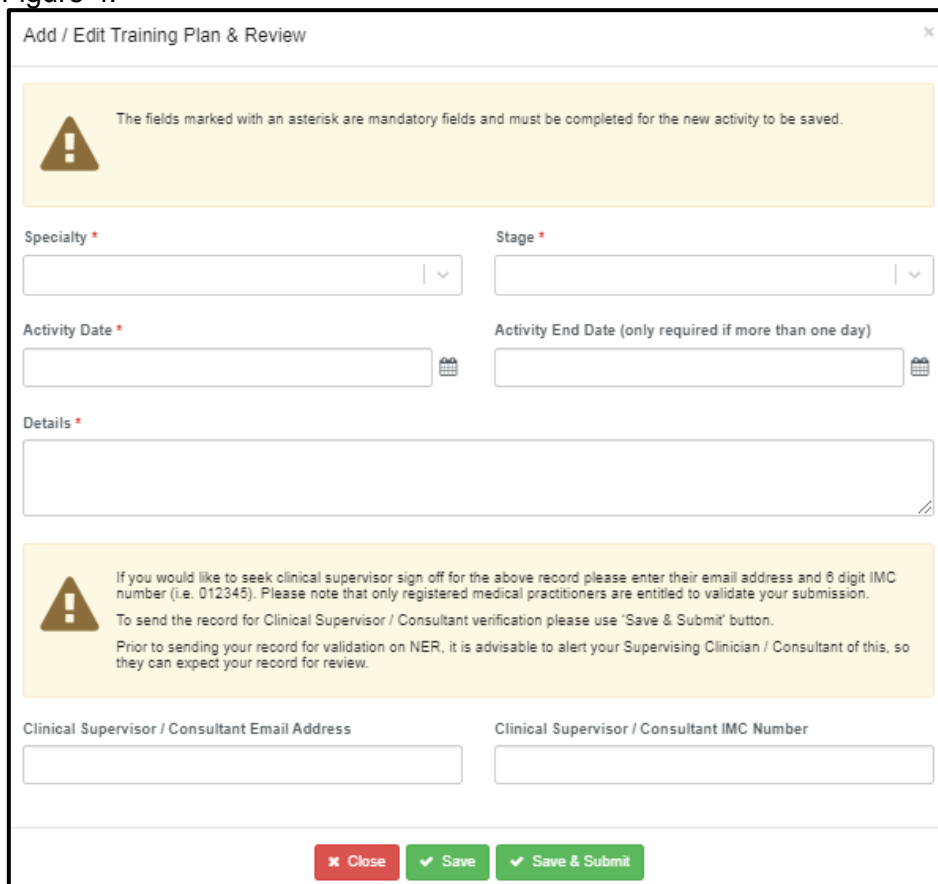
5. Attachments

NCHDs can add additional attachments if necessary

NCHDs can submit the record to their supervising clinician/consultant for validation by entering the clinician/consultants work email address, IMC number and clicking 'Save and Submit'.

2.4 Training Plan and Review

An NCHD can enter details of a Training Plan & Review they have taken by using the form shown in Figure 4.



Add / Edit Training Plan & Review

The fields marked with an asterisk are mandatory fields and must be completed for the new activity to be saved.

Specialty *

Stage *

Activity Date *

Activity End Date (only required if more than one day)

Details *

If you would like to seek clinical supervisor sign off for the above record please enter their email address and 6 digit IMC number (i.e. 012345). Please note that only registered medical practitioners are entitled to validate your submission.
 To send the record for Clinical Supervisor / Consultant verification please use 'Save & Submit' button.
 Prior to sending your record for validation on NER, it is advisable to alert your Supervising Clinician / Consultant of this, so they can expect your record for review.

Clinical Supervisor / Consultant Email Address

Clinical Supervisor / Consultant IMC Number

Figure 4: Adding/Editing a Training Plan & Review - NCHD

NCHDs must enter the following mandatory information for a Training Plan & Review record:

1. Specialty:

NCHDs should choose the specialty they were/are working in when they are entering the Training Plan

2. Stage:

NCHDs should choose one of the following:

- Start of Post
- Midpoint Review
- End of Post Review

3. Activity Date and Activity End Date:

Date or date range when the training plan refers to

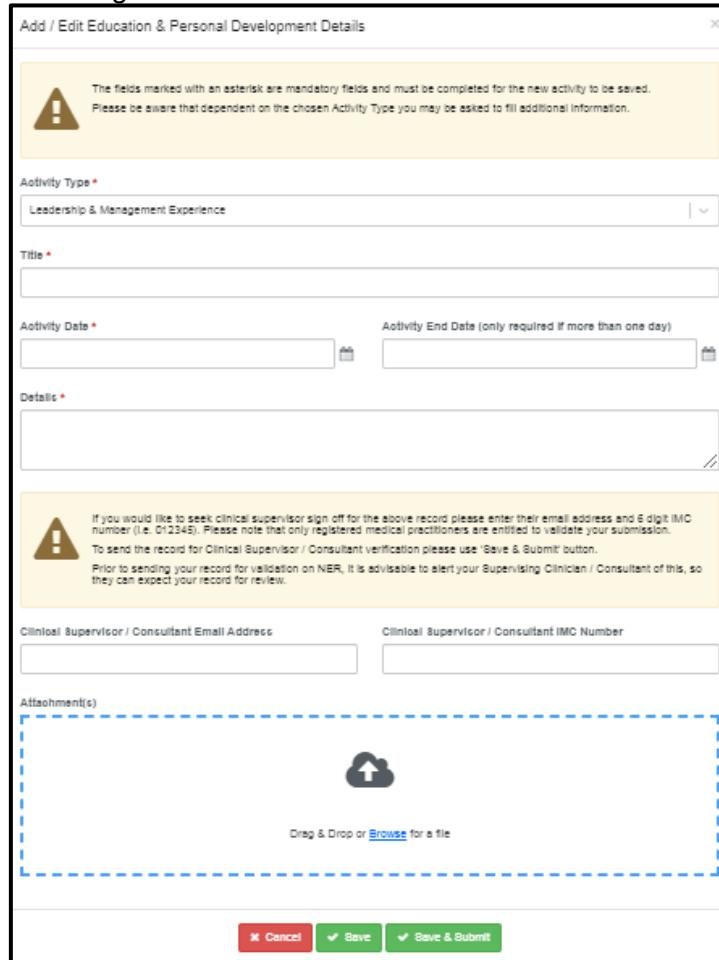
4. Details:

NCHD can give further details about the Training Plan

NCHDs can submit the record to their supervising clinician/consultant for validation by entering the clinician/consultants work email address, IMC number and clicking 'Save and Submit'.

2.5 Education & Personal Development – Leadership & Management Experience

An NCHD can enter details of Leadership & Management Experience they have taken by using the form shown in Figure 5.



Add / Edit Education & Personal Development Details

The fields marked with an asterisk are mandatory fields and must be completed for the new activity to be saved. Please be aware that dependent on the chosen Activity Type you may be asked to fill additional information.

Activity Type *
 Leadership & Management Experience

Title *

Activity Date *

Activity End Date (only required if more than one day)

Details *

If you would like to seek clinical supervisor sign off for the above record please enter their email address and 6 digit IMC number (i.e. 012345). Please note that only registered medical practitioners are entitled to validate your submission. To send the record for Clinical Supervisor / Consultant verification please use 'Save & Submit' button. Prior to sending your record for validation on NER, it is advisable to alert your Supervising Clinician / Consultant of this, so they can expect your record for review.

Clinical Supervisor / Consultant Email Address

Clinical Supervisor / Consultant IMC Number

Attachment(s)

Drag & Drop or [Browse](#) for a file

Figure 5: Adding/Editing Leadership & Management Experience - NCHD

NCHDs must enter the following mandatory information for a Leadership & Management Experience record:

1. Title:

NCHDs can create a title to describe the Leadership & Management Experience.

2. Stage:

NCHDs should choose one of the following:

- Start of Post
- Midpoint Review
- End of Post Review

3. Activity Date and Activity End Date:

Date or date range when the Leadership & Management Experience refers to

4. Details:

NCHD can give further details about the Leadership & Management Experience.

5. Attachments

NCHDs can add additional attachments if necessary

NCHDs can submit the record to their supervising clinician/consultant for validation by entering the clinician/consultants work email address, IMC number and clicking 'Save and Submit'.

Section 3 – Validation Process

3.1 Email Notification

When a NCHD is ready to submit a record to their Supervising Clinician/Consultant for review they will be asked to enter the Supervising Clinician/Consultants work email address. Supervising Clinician/Consultants email addresses must be from a recognised academic institution or clinical site. Personal email addresses such as gmail, yahoo or hotmail will **not** be accepted. This is to ensure that the verification request is sent to a genuine email address for a Supervising Clinician/Consultant.

As a Supervising Clinician/Consultant you will **not** need to have login details to view any records that have been sent to you for your validation. Instead, you will receive an email from dime@hse.ie once a week on a Monday, provided there are records awaiting your validation. If you do not have records awaiting validation you will **not** receive an email.

Emails are sent on a weekly basis to prevent you from receiving a large volume of emails. The email will contain a URL link, as shown in Figure 6, which you can use to access such records. Once the link is opened you will see all records awaiting validation from all NCHDs that have submitted records for validation. Please **do not** respond to this email address directly as it is not a monitored email address. NCHDs can only send records for validation if the activity start date is less than 6 months ago.

Dear Consultant,

HSE - National Doctors Training and Planning (NDTP) have provided NCHDs with access to an E-Portfolio on their National Employment Record (NER) portal. This allows NCHDs to record their career development and have their experience verified and validated by their Supervising Clinician / Consultant.

The following E-Portfolio activities are available for your review, as requested by the below NCHD(s):

NER User name	Activity	Submission date
Test User	Assessment	01/04/2021
Test User	Education And Personal Development	06/04/2021
Test User	Procedure	08/04/2021
Test User	Training Plan And Review	01/04/2021

To review and provide feedback on the above activities, please click on your personalised secure link below.

[TEST LINK HERE](#)

This link is only accessible by you via this email and it is essential that you **do not** circulate this email to another party. For identification purposes you will be asked to provide your IMC number. If you are having difficulty opening this link please copy and paste the link into your browser.

Should you require further information regarding the E-Portfolio or access to our user guides please see www.hse.ie/doctors

Thank You

HSE NDTP NER Logbook

*Please note this is an automated email response. Please do not respond to this email address as emails are not monitored. If you seek assistance please contact us at dime.team@hse.ie

National Doctors Training & Planning / Block 9E / Sancton Wood Building / Heuston South Quarter / Saint John's Road West / Dublin 8 / D08 TPX9

Figure 6: Email notification to Supervising Clinician/Consultant

3.2 Supervising Clinician/Consultant Accessing Records for Validation

This section can be accessed by a Supervising Clinician/Consultant using the system generated link which will be received via email.

Once this link is clicked it will redirect you to a page where you will have to confirm your IMC number.

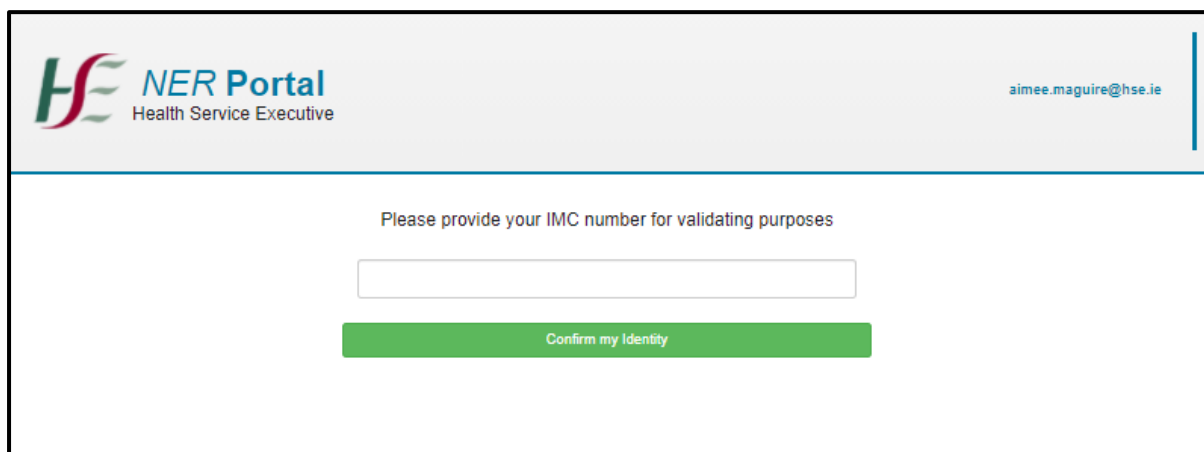
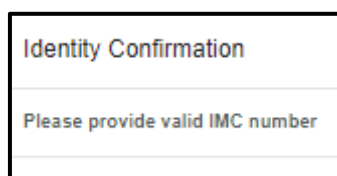


Figure 7: IMC Validation Screen

The IMC number must match the IMC number entered by the NCHD. If the IMC number does not match the IMC number input by the NCHD, the screen will show an error message saying:



If the IMC number entered by the NCHD matches the IMC number you have entered a pop-up message with following details will display:

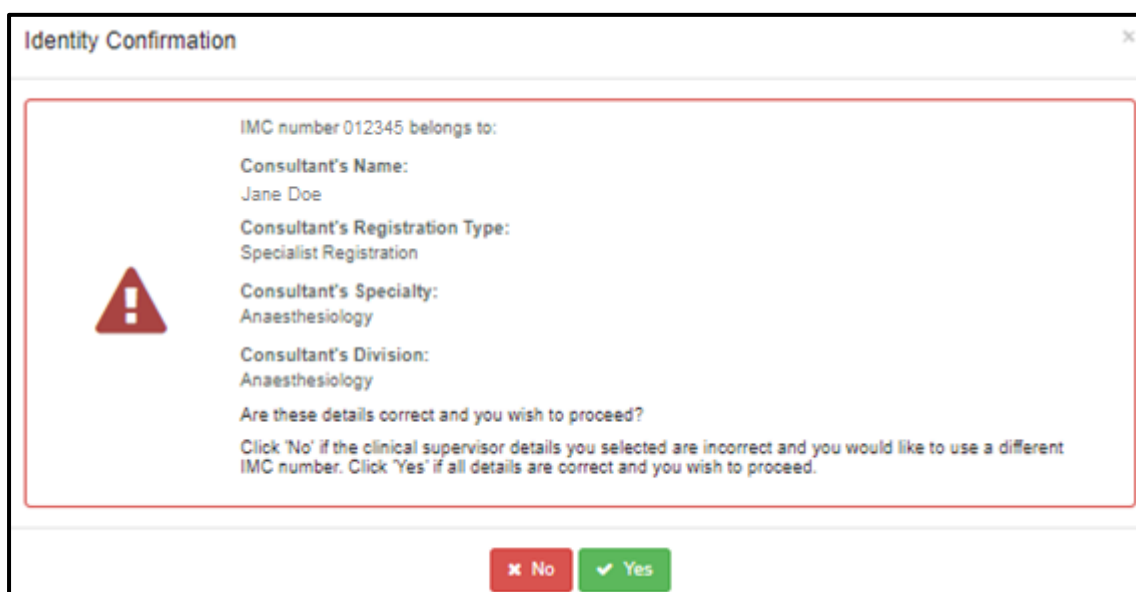
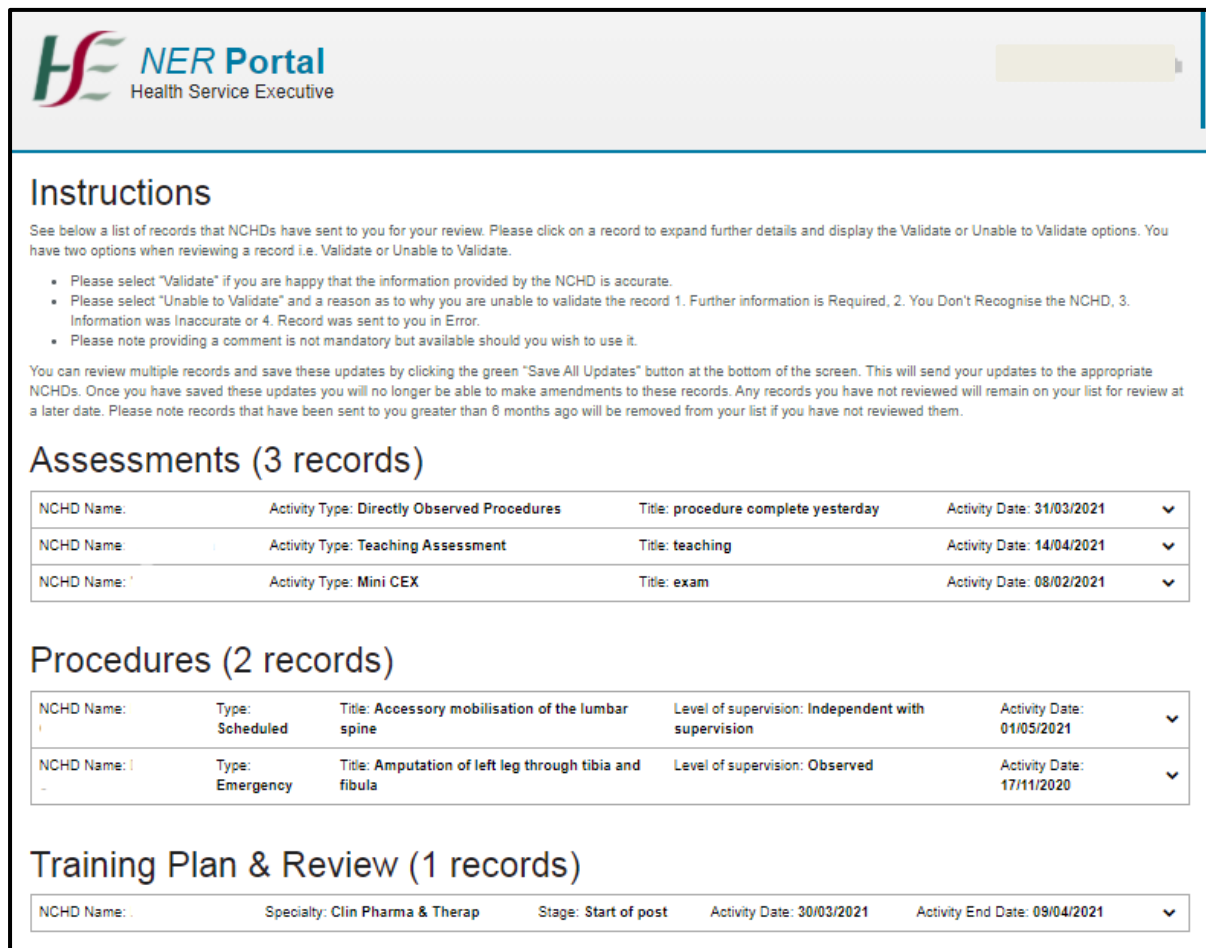


Figure 8: Supervising Clinician/Consultant Identity Verification

The Supervising Clinician/Consultant should check that the details on the pop up are correct before proceeding.

You should click 'No' if you wish to close this page and go back to validation page. You should click 'Yes' if you wish to proceed.

When you click on the 'Yes' button, you will be redirected to a page with any records awaiting review as shown below:



NER Portal
Health Service Executive

Instructions

See below a list of records that NCHDs have sent to you for your review. Please click on a record to expand further details and display the Validate or Unable to Validate options. You have two options when reviewing a record i.e. Validate or Unable to Validate.

- Please select "Validate" if you are happy that the information provided by the NCHD is accurate.
- Please select "Unable to Validate" and a reason as to why you are unable to validate the record 1. Further information is Required, 2. You Don't Recognise the NCHD, 3. Information was Inaccurate or 4. Record was sent to you in Error.
- Please note providing a comment is not mandatory but available should you wish to use it.

You can review multiple records and save these updates by clicking the green "Save All Updates" button at the bottom of the screen. This will send your updates to the appropriate NCHDs. Once you have saved these updates you will no longer be able to make amendments to these records. Any records you have not reviewed will remain on your list for review at a later date. Please note records that have been sent to you greater than 6 months ago will be removed from your list if you have not reviewed them.

Assessments (3 records)

NCHD Name:	Activity Type:	Title:	Activity Date:
	Directly Observed Procedures	procedure complete yesterday	31/03/2021
	Teaching Assessment	teaching	14/04/2021
	Mini CEX	exam	08/02/2021

Procedures (2 records)

NCHD Name:	Type:	Title:	Level of supervision:	Activity Date:
	Scheduled	Accessory mobilisation of the lumbar spine	Independent with supervision	01/05/2021
	Emergency	Amputation of left leg through tibia and fibula	Observed	17/11/2020


Training Plan & Review (1 records)

NCHD Name:	Specialty:	Stage:	Activity Date:	Activity End Date:
	Clin Pharma & Therap	Start of post	30/03/2021	09/04/2021

Figure 9: Supervising Clinician/Consultant Validation Screen

At the top of the page there are instructions on how to view, review and update records that have been sent to you for validation. Please note only activities that have completed **less than 6 months ago** will be visible for your review. Any activities that have been completed more than 6 months ago will be removed from your list for review.

Assessments or Educational & Personal Development records may have attachments associated with them. To view these attachments please click the blue attachment button. Please note this button will only be visible if the user has an attachment associated with the record.



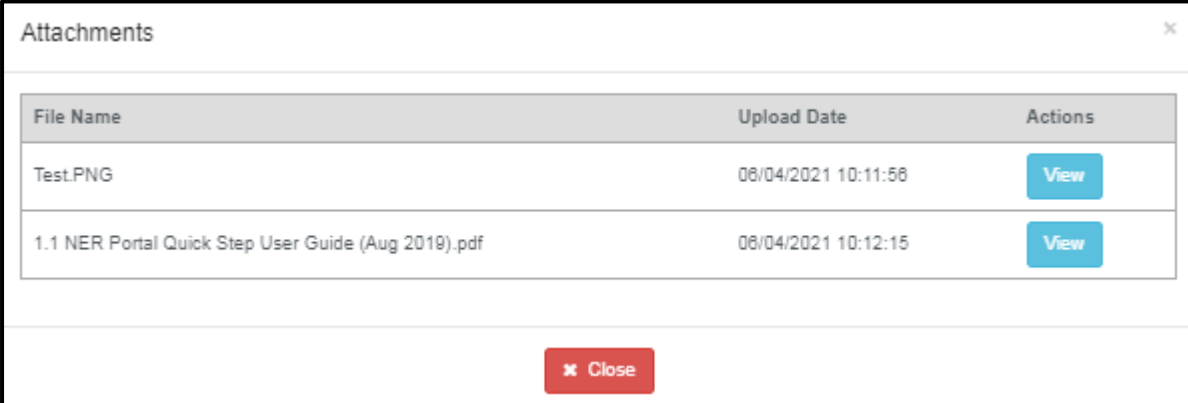
Education & Personal Development (1 records)

NCHD Name	Activity Type:	Title:	Activity Date:	Activity End Date:
	Leadership & Management Experience	test file	29/03/2021	-

[Attachments](#)

Figure 10: Attachments Button for Education & Personal Development

This will open a pop up window which will display any attachments associated with a record.



File Name	Upload Date	Actions
Test.PNG	06/04/2021 10:11:56	View
1.1 NER Portal Quick Step User Guide (Aug 2019).pdf	06/04/2021 10:12:15	View

[Close](#)

Figure 11: Viewing Attachments

To view an attachment in a new window of your browser, click the blue “View” button. NCHDs can attach multiple documents to a record however; the size of the attachment cannot exceed 5MB each and can only be the following formats: pdf, jpg, png.

3.3 Supervising Clinician/Consultant Validating a Record

To view the full details of a record, click on a record to expand and display all details. This will also display the “*Select Validation Option*” which allows you to select either “*Validate*” or “*Unable to Validate*” from the dropdown.

Once “*Validate*” is selected the following fields will become visible:

- **Comments** – there will be an optional comments box available for all records where you can provide any feedback or comments to the NCHD. This has a maximum character limit of 3000.
- **Level of Skill (mandatory – for Directly Observed Procedures Only)** – this is found under the Assessments section only for Directly Observed Procedures, there will be an additional dropdown with the following options:
 - Expert
 - Novice
 - Proficient
 - Trainee

Assessments (3 records)

NCHD Name: [redacted]	Activity Type: Directly Observed Procedures	Title: procedure complete yesterday	Activity Date: 31/03/2021	⬆
Details performed yesterday		Select Validation Option <div>Validate</div>		
		Level Of Skill * <div>Select...</div>		
		Level of skill is mandatory field.		
		Comments (Optional) <div></div>		
NCHD Name: [redacted]	Activity Type: Teaching Assessment	Title: teaching	Activity Date: 14/04/2021	⬇
NCHD Name: [redacted]	Activity Type: Mini CEX	Title: exam	Activity Date: 08/02/2021	⬇

Procedures (2 records)

NCHD Name: [redacted]	Type: Scheduled	Title: Accessory mobilisation of the lumbar spine	Level of supervision: Independent with supervision	Activity Date: 01/05/2021	⬇
NCHD Name: [redacted]	Type: Emergency	Title: Amputation of left leg through tibia and fibula	Level of supervision: Observed	Activity Date: 17/11/2020	⬇

Figure 12: Supervising Clinician/Consultant Screen – Validating a Record

If you have selected the incorrect validation option you can click the “x” to clear the field.

Once you have validated a record it will be highlighted in green to let you know what records you have reviewed. Records can be updated collectively and any updates saved at the end.

Assessments (3 records)

NCHD Name: [redacted]	Activity Type: Directly Observed Procedures	Title: procedure complete yesterday	Activity Date: 31/03/2021	⬇
NCHD Name: [redacted]	Activity Type: Teaching Assessment	Title: teaching	Activity Date: 14/04/2021	⬇
NCHD Name: [redacted]	Activity Type: Mini CEX	Title: exam	Activity Date: 08/02/2021	⬇

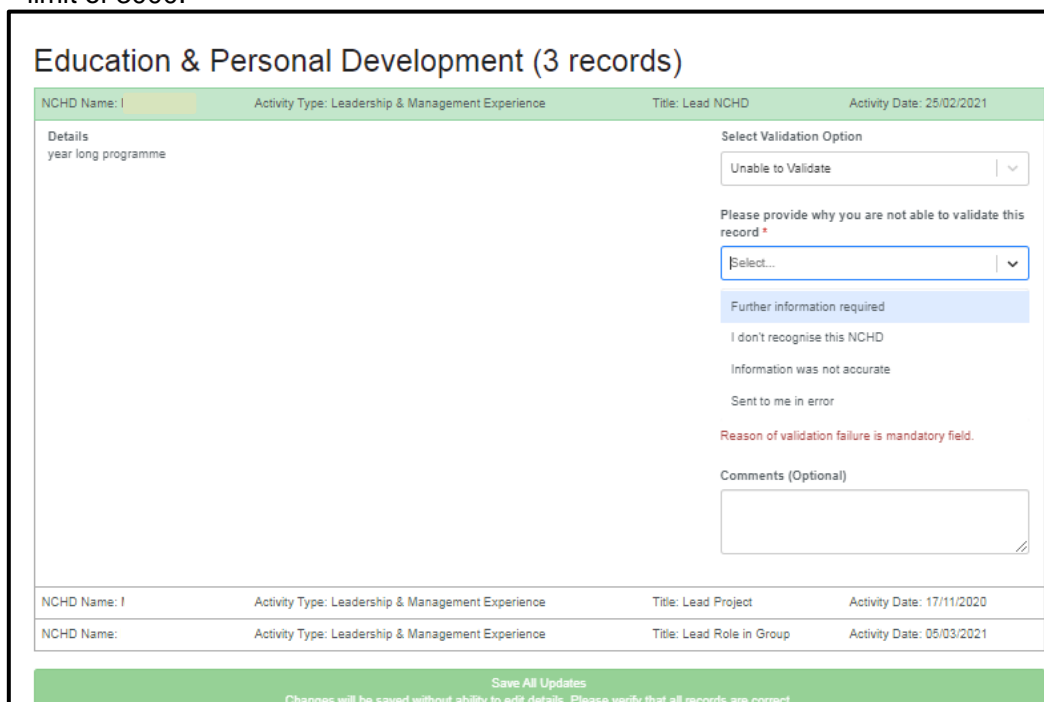
Figure 13: Records Reviewed

3.4 Supervising Clinician/Consultant Unable to Validate a Record

To view the full details of a record, click on a record to expand and display all details. This will also display the “*Select Validation Option*” which allows you to select either “*Validate*” or “*Unable to Validate*” from the dropdown.

Once “*Unable to Validate*” is selected the following fields will become visible:

- **Please provide why you are not able to validate this record (mandatory)** – this is a dropdown with the following options:
 - Further Information Required - if this option is selected and saved the NCHD will be able to edit this record further.
 - I do not recognise this NCHD - if this option is selected and saved the NCHD will be able to edit this record further.
 - Information was not accurate – if this option is selected and saved the NCHD will **not** be able to amend this record further
 - Sent to me in error - if this option is selected and saved the NCHD will be able to edit this record further.
- **Comments** - there will be an optional comments box available for all records where you can provide any feedback or comments to the NCHD. This has a maximum character limit of 3000.



The screenshot shows a web interface titled "Education & Personal Development (3 records)". It displays a table with three records. The first record, "Lead NCHD", is highlighted in green. To the right of this record is a form titled "Select Validation Option" with a dropdown menu set to "Unable to Validate". Below this is a section titled "Please provide why you are not able to validate this record *" with a dropdown menu set to "Select...". Below this is a section titled "Comments (Optional)" with a text area. At the bottom of the form is a green button labeled "Save All Updates".

Figure 14: Supervising Clinician/Consultant Screen – Unable to Validate a Record

Once you have selected unable to validate a record it will be highlighted in green to let you know what records you have reviewed. Records can be updated collectively and any updates saved at the end.



The screenshot shows a web interface titled "Education & Personal Development (3 records)". It displays a table with three records. The first record, "Lead NCHD", is highlighted in green. The table has four columns: "NCHD Name", "Activity Type", "Title", and "Activity Date".

NCHD Name	Activity Type	Title	Activity Date
Lead NCHD	Leadership & Management Experience	Lead NCHD	25/02/2021
Lead Project	Leadership & Management Experience	Lead Project	17/11/2020
Lead Role in Group	Leadership & Management Experience	Lead Role in Group	05/03/2021

Figure 15: Records Reviewed

3.5 Saving Updates

You do not need to review all records on your screen to save updates. Once you have reviewed any records and you want to save your updates you should click the green “Save all Updates” at the bottom of your screen.

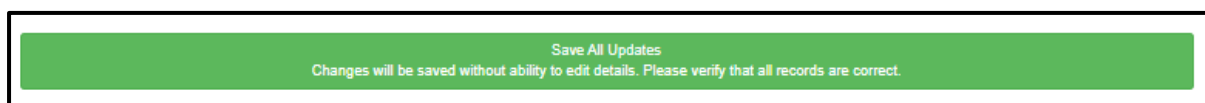


Figure 16: Save all Updates button

We would advise saving your updates regularly to avoid losing any of your work.

Once ‘Save all Updates’ is clicked the following screen appears:

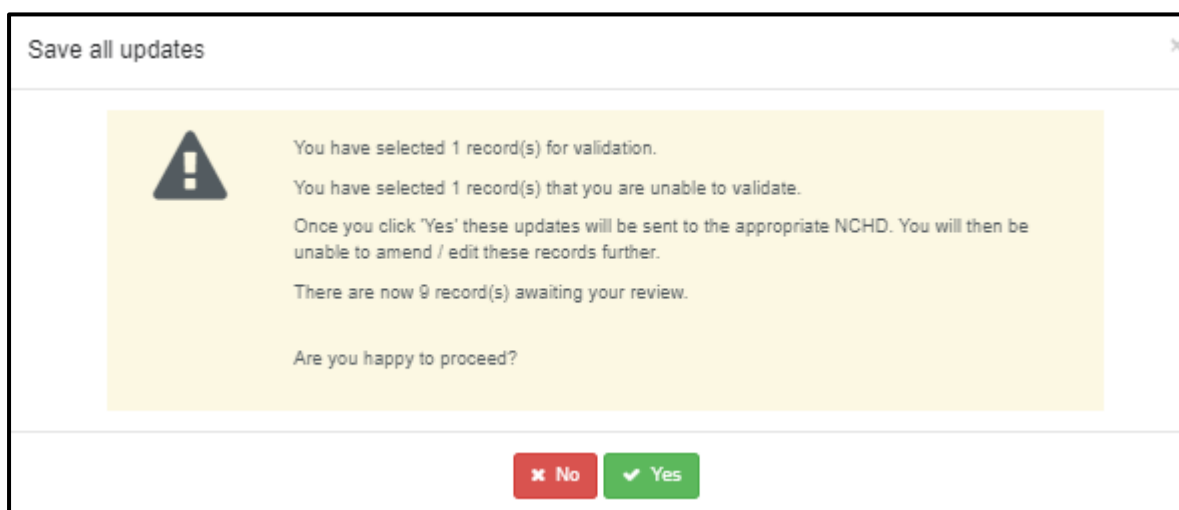


Figure 17: Supervising Clinician/Consultant Screen – Confirmation of Validation Screen.

This pop up will state how many records you are validating, how many records you are unable to validate and how many records will remain on your list as awaiting review.

If you are happy with the updates and want to proceed click the ‘Yes’ button. Confirmation of review will be sent to the relevant NCHD and their E-Portfolio will be updated accordingly.

To return to the validation screen, click the ‘No’ button. Any updates will not be saved at this point.

Section 4 – Troubleshooting/Queries

If you have any queries or issues please contact dime.team@hse.ie