User Manual for CSHK E-Portfolio System

For Trainer

Index

Introduction

E-Portfolio System is a platform designed to streamline the submission of assessments, e-logbook entries, tracking of completion of various training requirements, and digitize existing procedures like examination application and registration.

Welcome to the user manual for CSHK E-Portfolio System. This manual is designed to guide you through the operation of the platform. Please read this manual carefully before proceeding to ensure efficient use of the platform.

This user manual is designed to equip you with a comprehensive, step-by-step approach to delivering feedback and ratings to your trainees. This manual will guide you through the process of how trainers provide feedback to trainees and how can effectively use the platform. It will provide detailed instructions on how trainers can use the platform to review trainee progress, provide constructive feedback and communicate with trainees effectively.

Overview of User Interface and System Functions

(Default page is Dashboard)

After logging in, you will be directed to the following page:

Select your user role (such as trainer, fellows) in the pull-down menu, each role will display different available functions in the side menu.

Side Menu: Menu to navigate the system, you may click on " ☰ " to show or hide the side menu.

Tasks: Indicate the status and deadline of your required assignment.

Notification: Display your latest three unread messages.

CME Record: A brief summary of your CME record

# Feedback and Ratings Providing Guidelines
(CBD, CEX, PBA, Surgical DOPS, Endoscopic DOPS, Half-yearly Assessment)
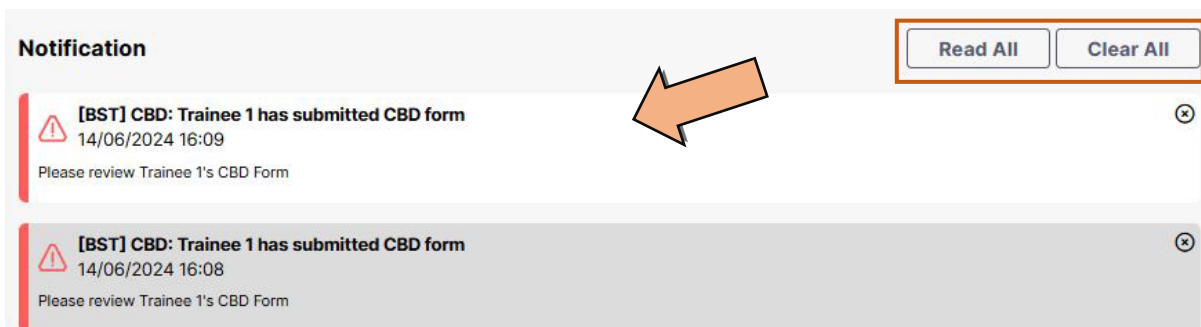
Overview

Step 1)

After your trainee has submitted the form, you shall receive a notification. You can click "notification" to review the message or access this page through the side menu as well. You will be routed to the assignment home page (refer to **Fig. 3**) by clicking the notification message.

[Fig. 1]
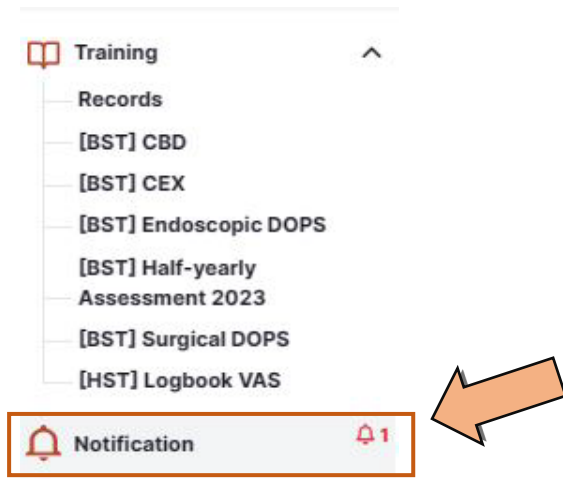
[Fig. 2]

- ❖ *The background of the notification message will turn grey after you have click on it.*
- ❖ **Read All:** *Click to designate all notification messages as read. The background of all notification messages will turn grey.*
- ❖ **Clear All:** *Click to delete all notification messages.*

[Fig. 3]

Training

[BST] CBD

Trainees are required to submit at least 1 CBD per rotation period

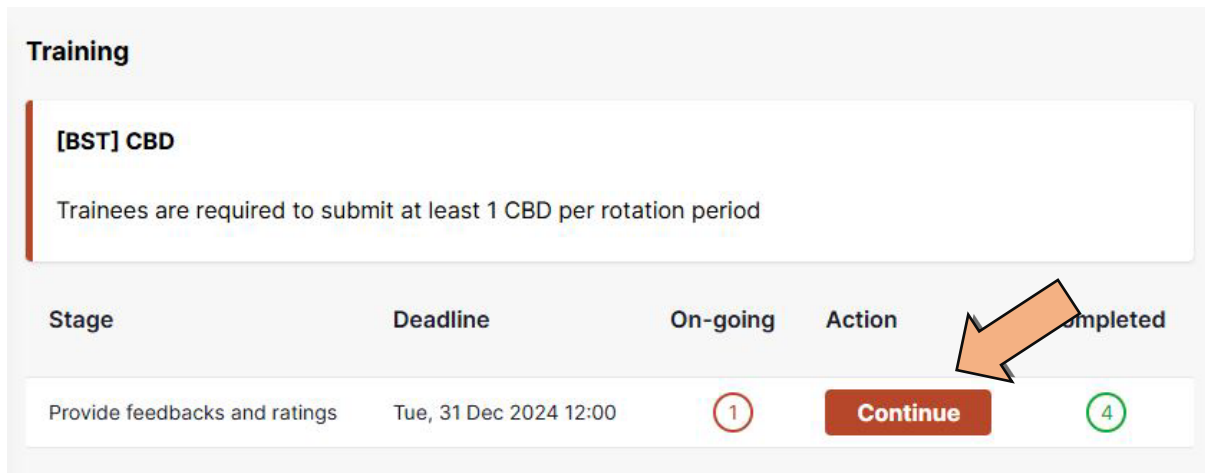| Stage	Deadline	On-going	Action	Completed
Provide feedbacks and ratings	Tue, 31 Dec 2024 12:00	①	**Continue**	④

(1) **Stage**: Outline the tasks you need to follow to successfully complete the assignment.

(2) **Deadline:** Specific date or time by which a stage must be completed or submitted

(3) **On-going**: Indicates the remaining assignments in each stage. A number will appear in this section if you have any pending assignment.

(4) **Action**: Click the "Continue" button to proceed to any uncompleted task.

(5) **Completed:** The number of tasks completed in each stage.

Provide Feedbacks and Ratings for Competency Assessment

Step 1)

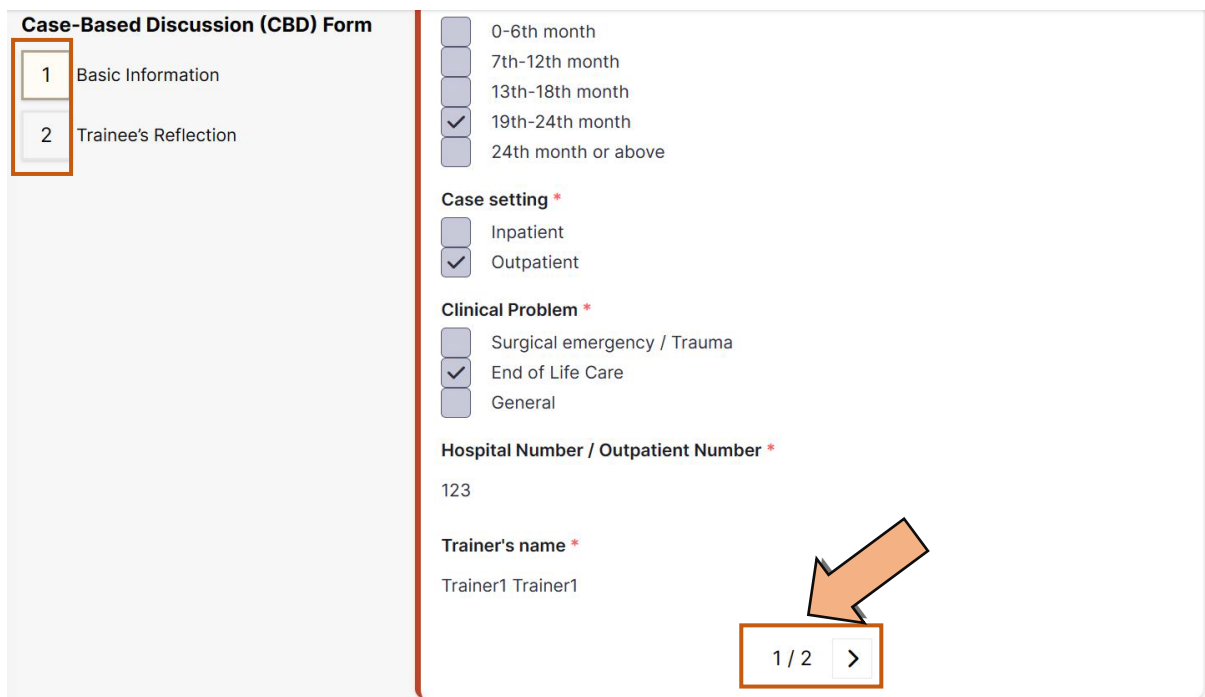Click the "Continue" button to start providing feedbacks and ratings
.

[Fig. 4]

Step 2)

Read through the basic information and reflections that were submitted by your trainee.

[Fig. 5]

❖ ***Page details*** *can be found on the left, you may use the arrow key at the bottom to move to next or previous page.*

Step 3)

Complete the form, including **all mandatory fields with (*)** and click the "Submit" button to proceed to the next step. **You will not be able to submit the form if one of the mandatory fields is missing, the system shall display a message on which answer is required**

[Fig. 6]

Step 4)

Check the box to sign the form and click the "Submit" button to complete the evaluating. Upon submission, you will then be routed to the home page (refer to Fig. 8).

[Fig. 7]

* **Save:** You can save your current work for subsequent editing before final submission.

[Fig. 8]

Provide Feedbacks and Ratings for Half-yearly Assessment

Step 1)

Click the "Continue" button to start providing feedbacks and ratings

[Fig. 9]

Training

[BST] Half-yearly Assessment 2024

Trainees are required to select Trainer under "Rotation" and complete the prerequisite tasks below before starting the assessment.
2 Half-yearly Assessment are required for each rotation period!
Trainees are required to counter sign the assessment after your Trainer has given you your mark, please follow the instructions below!

Prerequisite List

Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] Surgical DOPS	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] Endoscopic DOPS	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] CBD	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] CEX	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	Select Trainer	1

Stage	Deadline	On-going	Action	Completed
Provide feedbacks and ratings	Tue, 31 Dec 2024 18:00	2	Continue	-

Step 2)

Please read through the basic information and reflections that were submitted by your trainee.

[Fig. 15]

❖ *Page details can be found on the left, you may use the arrow key at the bottom to move to next or previous page.*

Step 3)

Please complete the form, including **all mandatory fields with (*)** and click the "Submit" button to proceed to the next step.

- ❖ *Page details can be found on the left, you may use the arrow key at the bottom to move to next or previous page.*
- ❖ **Save:** You can save your current work for subsequent editing before final submission.

Step 4)

Check the box to sign the form and click the "Submit" button to complete the form. Upon submission, you will then be routed to the home page (refer to Fig. 18). **You will not be able to submit the form if one of the mandatory fields is missing, the system shall display a message on which answer is required**

[Fig. 17]

[Fig. 18]

Training

[BST] Half-yearly Assessment 2024

Trainees are required to select Trainer under "Rotation" and complete the prerequisite tasks below before starting the assessment.
2 Half-yearly Assessment are required for each rotation period!
Trainees are required to counter sign the assessment after your Trainer has given you your mark, please follow the instructions below!

Prerequisite List

Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] Surgical DOPS	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] Endoscopic DOPS	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] CBD	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	[BST] CEX	1
Start Date	End Date	Campaign	Quantity
01/01/2023	31/12/2024	Select Trainer	1

Stage	Deadline	On-going	Action	Completed
Provide feedbacks and ratings	Tue, 31 Dec 2024 18:00	1	Continue	1

Training Plan

(Objective Setting, Midterm, Final)

Provide Feedbacks and Ratings Assessment

Step 1)

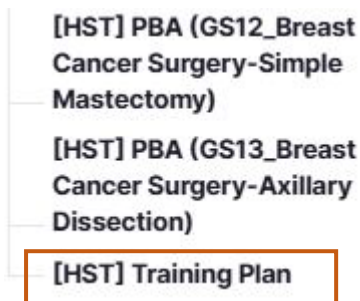Press "Training" in the side menu to expand this module.

[Fig. 19]

Step 2)

Select "Training Plan" to start the assessment (Objective Setting of Training Plan will be used as an example). Upon selection, you will then be routed to a home page (refer to **Fig. 21**).
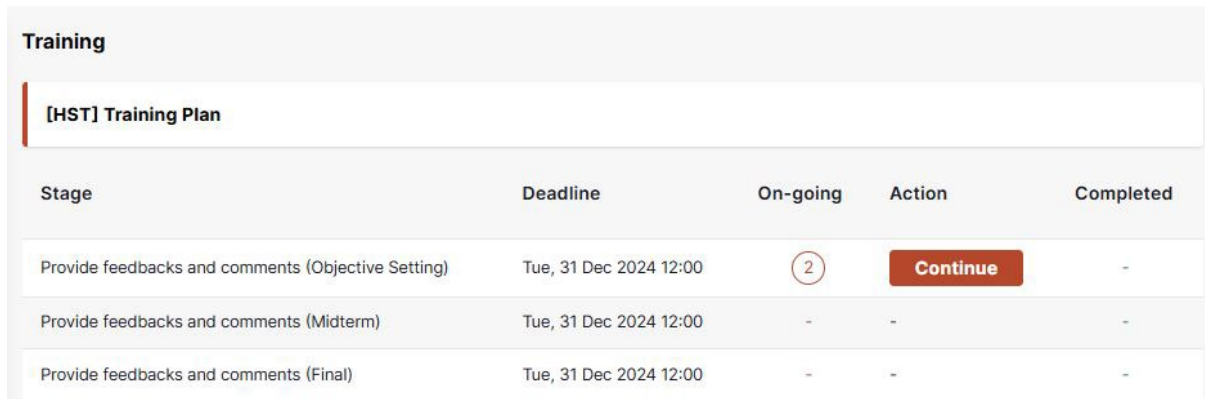
[Fig. 20]

Step 3)
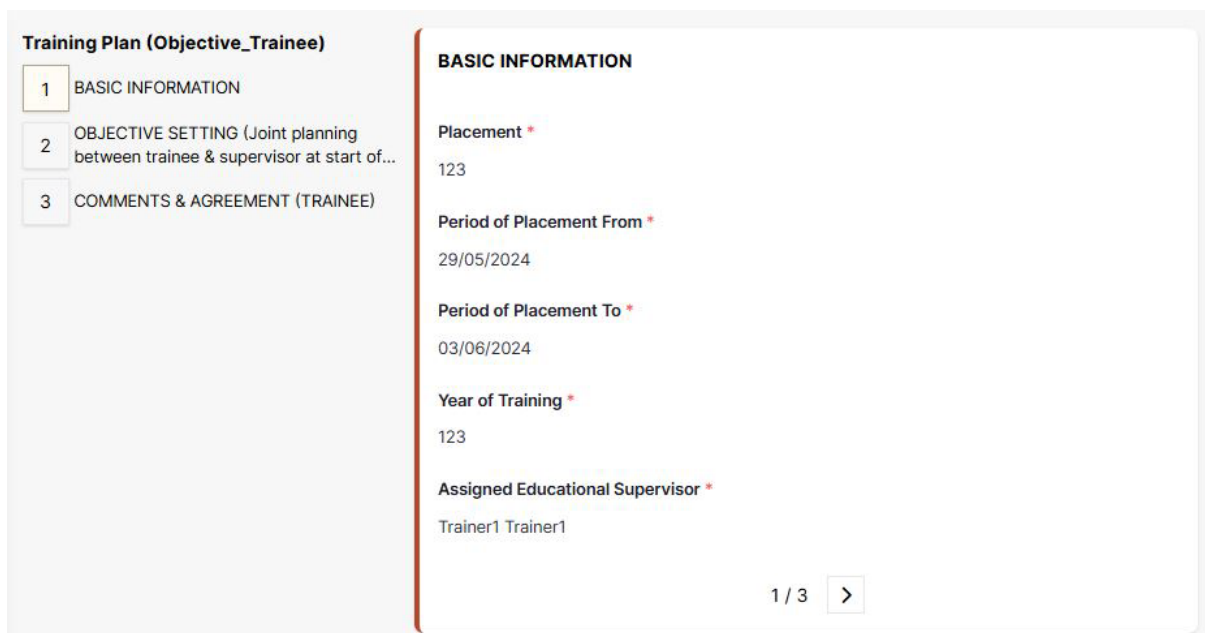
Click the "Continue" button to provide feedbacks and ratings for the assessment.

[Fig. 21]

Training

[HST] Training Plan

| Stage	Deadline	On-going	Action	Completed
Provide feedbacks and comments (Objective Setting)	Tue, 31 Dec 2024 12:00	②	**Continue**	-
Provide feedbacks and comments (Midterm)	Tue, 31 Dec 2024 12:00	-	-	-
Provide feedbacks and comments (Final)	Tue, 31 Dec 2024 12:00	-	-	-

Step 4)

Read through the basic information that were submitted by your trainee.

[Fig. 22]

Training Plan (Objective_Trainee)

1 BASIC INFORMATION

2 OBJECTIVE SETTING (Joint planning between trainee & supervisor at start of...

3 COMMENTS & AGREEMENT (TRAINEE)

BASIC INFORMATION

Placement *
123

Period of Placement From *
29/05/2024

Period of Placement To *
03/06/2024

Year of Training *
123

Assigned Educational Supervisor *
Trainer1 Trainer1

1 / 3 >

❖ *Page details can be found on the left, you may use the arrow key at the bottom to move to next or previous page.*

Step 5)

Complete the form, including **all mandatory fields with (*)**, check the box to sign the form and click the "Submit" button to complete the evaluating. Upon submission, you will then be routed to the home page (refer to Fig. 24).

[Fig. 23]

Trainees will not be able to proceed to "Midterm" if you have not provided feedbacks and comments on "Objective Setting", same goes to "Final"

[Fig. 24]

Records of Assessments

You will be able to view all assessment records of your assigned trainee in addition to the assignments which you have provided feedbacks and ratings via "Training" → "Records".
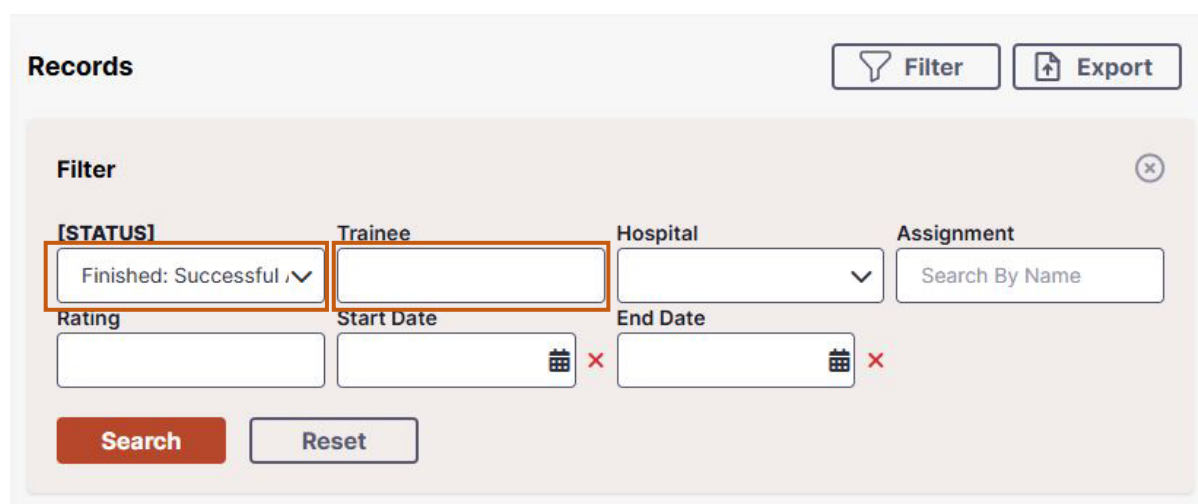
[Fig. 25]

[Fig. 26]
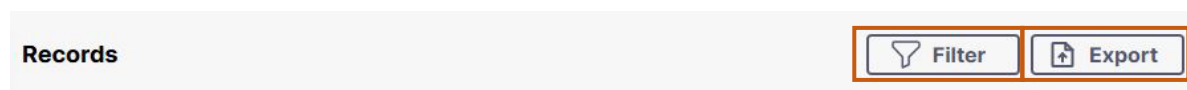
[Fig. 27]

- ❖ **Filter**: Click the "Filter" button to expand the menu.
- ❖ **Export**: Click the "Export" button to export your submissions to an Excel document.
- ❖ **Status**: the status of the assignment which included:
    - ○ **Created: Assignment in progress:** Assignments that have not been fully completed, some tasks are yet to finished (by you, trainee or secretariat)
    - ○ **Finished: Completed Assignment:** All tasks in the assignment are completed, and there is no more remaining tasks.

[Fig. 28]

❖ **Current Task**: You may find the current stage of your incompleted assignments. No result will be shown if you have completed the assignment as shown above