



User Manual for CSHK E-Portfolio System

For Trainer



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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:

1

The College of Surgeons of Hong Kong
香港外科醫學院

Trainer1 Trainer1
Fellow

Logout

Profile
Training
Examination
CME
CME Application
Course
Annual Subscription
Notification
News

FAQ
Change Password
Logout

Dashboard

Tasks

Completed Assignment	Deadline
[BST] CBD	31/12/2024...
[BST] CEX	31/03/202...
[BST] Surgical DOPS	31/03/202...
[BST] Endoscopic DOPS	01/01/2029...
[BST] Half-yearly Assessme...	31/12/2024...
[BST]

Notification

- Half-yearly Assessment: Trainee 1 has submitted Half-yearly Assessment form
07/06/2024 15:12
Please review Trainee 1's Half-yearly Assessment form
- [BST] Endoscopic DOPS: Trainee 1 has submitted Endoscopic DOPS form
07/06/2024 12:54
Please review Trainee 1's Endoscopic DOPS form
- [BST] Surgical DOPS: Trainee 1 has submitted


CME Record

Period	Category 1	Category 2
--------	------------	------------

1

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

2

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

3

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

4

Notification: Display your latest three unread messages.

5

CME Record: A brief summary of your CME record

Feedback and Ratings Providing Guidelines

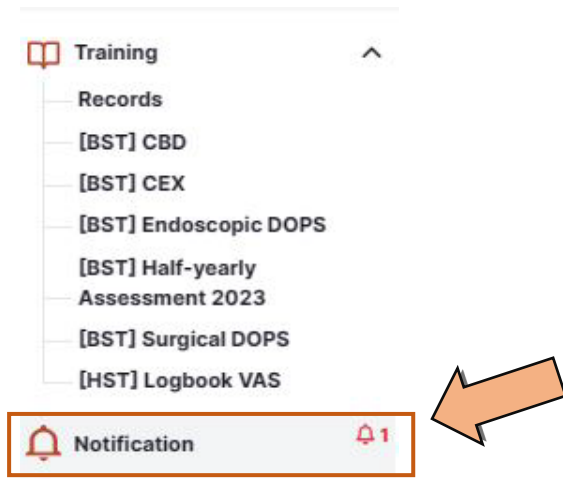
(CBD, CEX, PBA, Surgical DOPS, Endoscopic DOPS, Half-yearly Assessment)

Overview

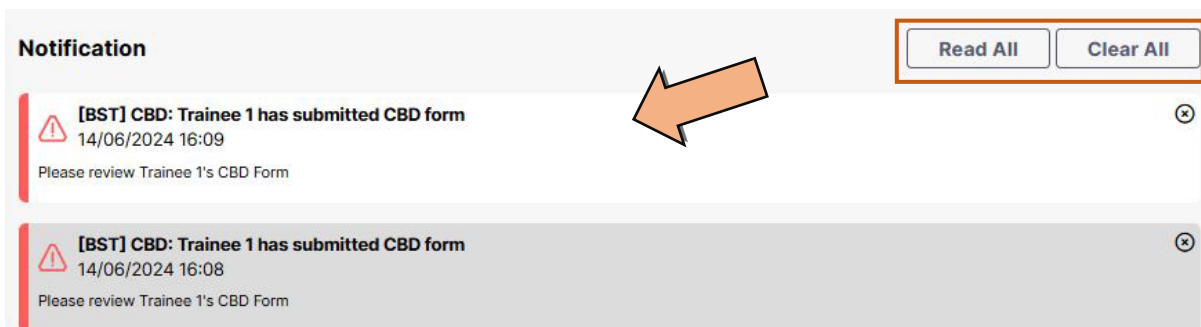
Step 1)

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

1	2	3	4	5
Stage	Deadline	On-going	Action	Completed
Provide feedbacks and ratings	Tue, 31 Dec 2024 12:00	1	Continue	4

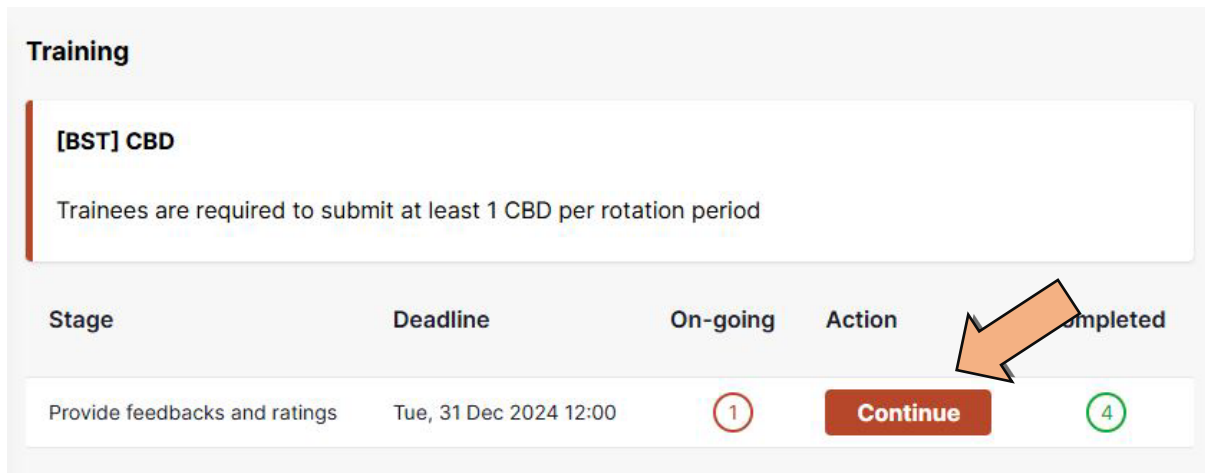
- 1 Stage:** Outline the tasks you need to follow to successfully complete the assignment.
- 2 Deadline:** Specific date or time by which a stage must be completed or submitted
- 3 On-going:** Indicates the remaining assignments in each stage. A number will appear in this section if you have any pending 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]



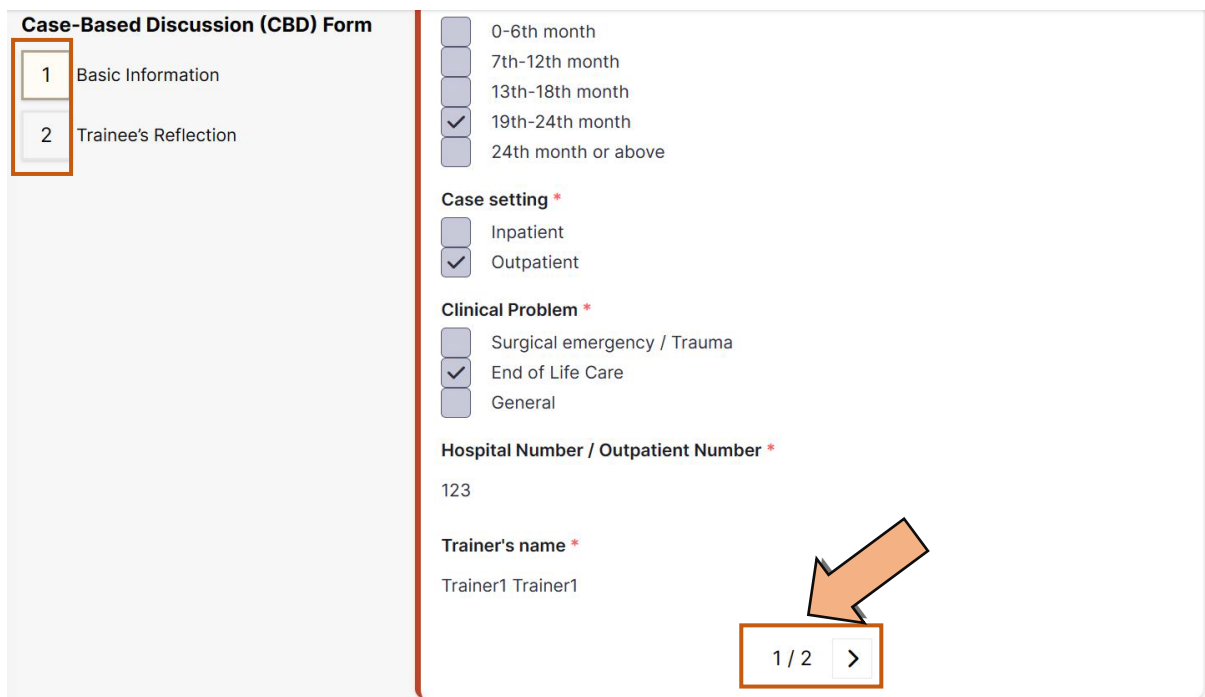
The screenshot shows a 'Training' section with a title '[BST] CBD' and a description: 'Trainees are required to submit at least 1 CBD per rotation period'. Below this is a table with the following columns: Stage, Deadline, On-going, Action, and Completed. The 'On-going' column contains a red circle with the number '1'. The 'Action' column contains a red 'Continue' button, which is highlighted by an orange arrow. The 'Completed' column contains a green circle with the number '4'.

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

Step 2)

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

[Fig. 5]



The screenshot shows the 'Case-Based Discussion (CBD) Form' with a left sidebar containing two items: '1 Basic Information' and '2 Trainee's Reflection'. The main content area contains several sections with radio button options:

- Time Period:** 0-6th month, 7th-12th month, 13th-18th month, 19th-24th month (checked), 24th month or above.
- Case setting *:** Inpatient, Outpatient (checked).
- Clinical Problem *:** Surgical emergency / Trauma, End of Life Care (checked), General.
- Hospital Number / Outpatient Number *:** 123.
- Trainer's name *:** Trainer1 Trainer1.

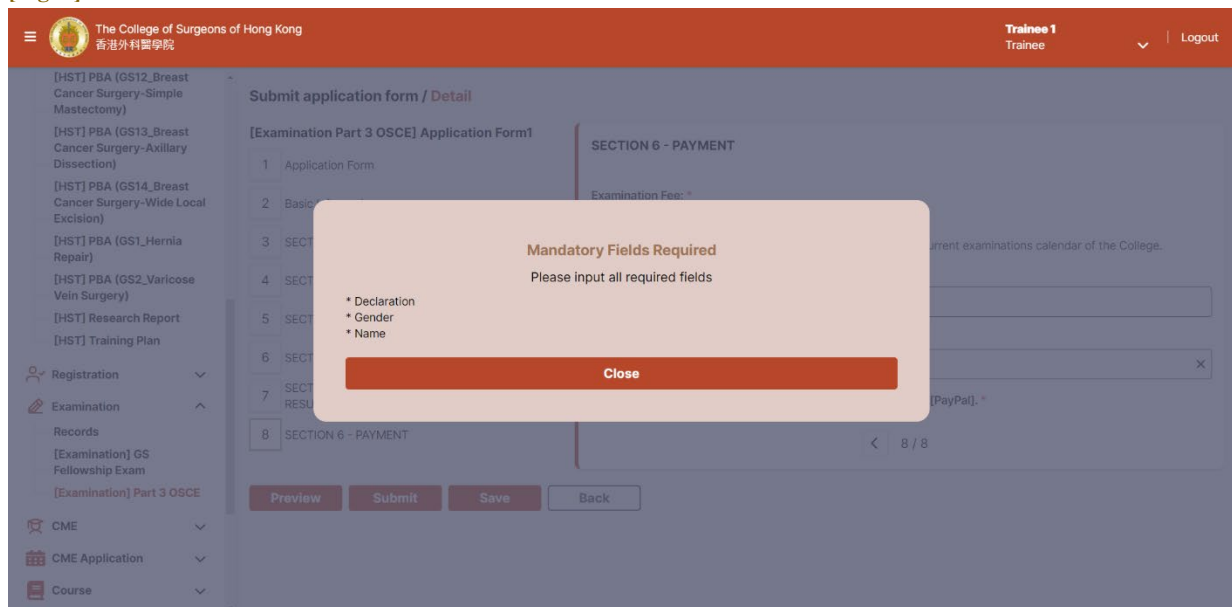
At the bottom right, there is a navigation bar with '1 / 2' and a right arrow, which is highlighted by an orange arrow.

❖ *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]

[BST] Case-Based Discussion (CBD) Score Sheet

1 Assessor's Comment

2 Assessor's Feedback

Time taken for observation (mins) *

Time taken for feedback (mins) *

Assessor's name *

Trainer1 Trainer1

Assessor's institutional e-mail address *

dfsjdkn@gmail.com

Tick this box to digitally sign this form

< 2 / 2

Submit Save Back

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

[Fig. 8]

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	-	-	5

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
01/01/2023	31/12/2024	[BST] Endoscopic DOPS	1
01/01/2023	31/12/2024	[BST] CBD	1
01/01/2023	31/12/2024	[BST] CEX	1
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]

[BST] Half-yearly Assessment Form

- 1 Basic Information
- 2 RESEARCH ACTIVITIES DURING CURRENT TERM
- 3 COMPETENCY ASSESSMENT
- 4 REPORT ON CME PROGRAMME

Basic Information

Trainer *
Trainer1 Trainer1

Training Period From *
01/01/2024

Training Period To *
31/12/2024

Date of commencement of Basic Surgical Training *
01/01/2024

Hospital *
Alice Ho Miu Ling Nethersole Hospital

Specialty in Training *
Accident & Emergency

No. of Days absent *
21

Reason for absence
(e.g. holiday / study leave / others)
21

1 / 4 >

❖ 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.

[Fig. 16]

[BST] Half-yearly Assessment Score Sheet

1	GUIDELINES FOR SUPERVISOR
2	(A) KNOWLEDGE
3	(B) CLINICAL SKILLS
4	(C) TECHNICAL SKILLS
5	(D) PROFESSIONALISM
6	Overall Rating

GUIDELINES FOR SUPERVISOR

Guidelines for Supervisor *

Please enter your number (scored 1-5) in the column provided, which best represents your assessment using the prompts as a guide. Each column must contain a number. Note that explanatory comments would be required for a score of 1, 2 and 5 in "Overall Rating" of the performance.

1 / 6 >

Submit **Save** Back

- ❖ *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]

[BST] Half-yearly Assessment Score Sheet

1	GUIDELINES FOR SUPERVISOR
2	(A) KNOWLEDGE
3	(B) CLINICAL SKILLS
4	(C) TECHNICAL SKILLS
5	(D) PROFESSIONALISM
6	Overall Rating

Overall Rating

Overall Rating *

1=Poor
 2=Deficient
 3=Satisfactory
 4=Above Average
 5=Above Average

Log Book Statistics *

1=Poor
 2=Deficient
 3=Satisfactory
 4=Above Average
 5=Excellent

Recommendations Regarding Future Training *

Trainee should continue in Training Position.
 Continued position in training programme in doubt due to identified deficiencies.
 Trainee should be removed from training programme because of deficiencies that have not been rectified.

Tick this box to digitally sign this form

< 6 / 6

Submit **Save** **Back**

[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
01/01/2023	31/12/2024	[BST] Endoscopic DOPS	1
01/01/2023	31/12/2024	[BST] CBD	1
01/01/2023	31/12/2024	[BST] CEX	1
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.

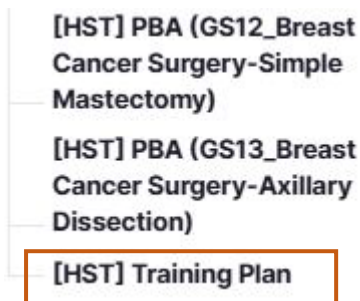
[Fig. 19]



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**).

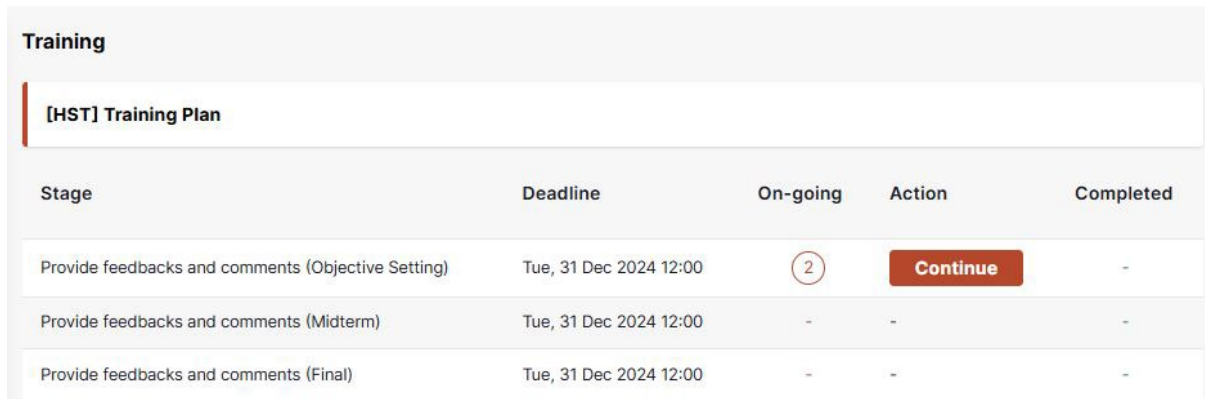
[Fig. 20]



Step 3)

Click the “Continue” button to provide feedbacks and ratings for the assessment.

[Fig. 21]

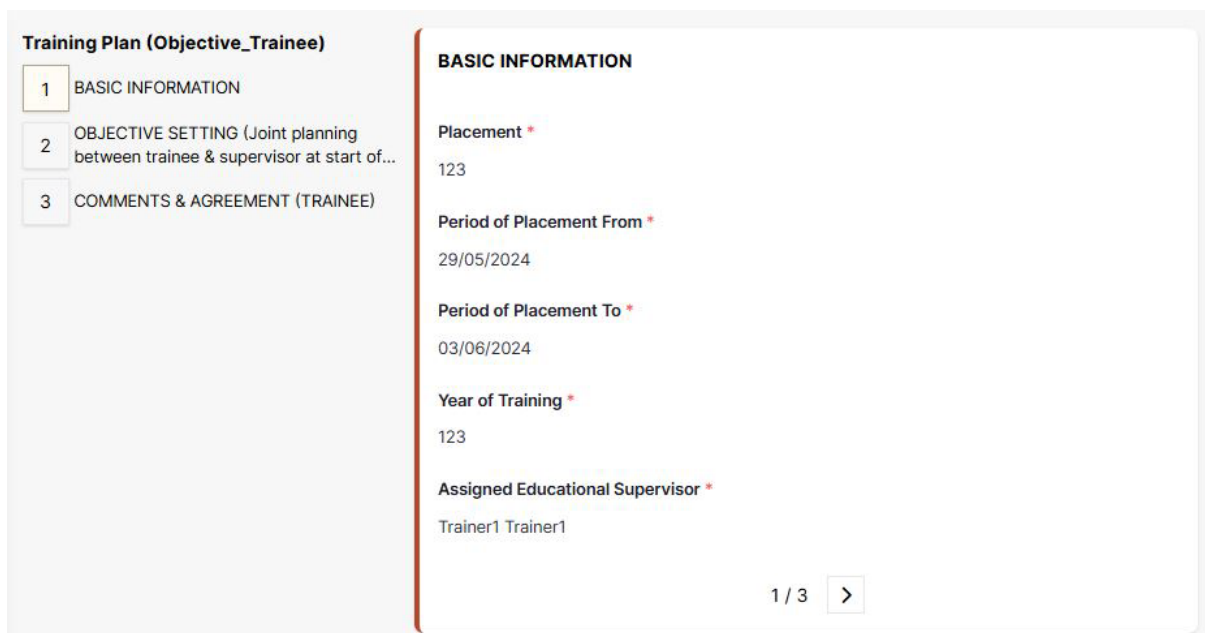


Stage	Deadline	On-going	Action	Completed
Provide feedbacks and comments (Objective Setting)	Tue, 31 Dec 2024 12:00	2	Continue	-
Provide feedbacks and comments (Midterm)	Tue, 31 Dec 2024 12:00	-	-	-
Provide feedbacks and comments (Final)	Tue, 31 Dec 2024 12:00	-	-	-

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]

Training Plan (Objective_Supervisor)

1 COMMENTS & AGREEMENT (SUPERVISOR)

COMMENTS & AGREEMENT (SUPERVISOR)

COMMENTS *

Tick this box to digitally sign this form

DATE *

Submit Save Back

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]

Training

[HST] Training Plan

Stage	Deadline	On-going	Action	Completed
Provide feedbacks and comments (Objective Setting)	Tue, 31 Dec 2024 12:00	1	Continue	1
Provide feedbacks and comments (Midterm)	Tue, 31 Dec 2024 12:00	-	-	-
Provide feedbacks and comments (Final)	Tue, 31 Dec 2024 12:00	-	-	-

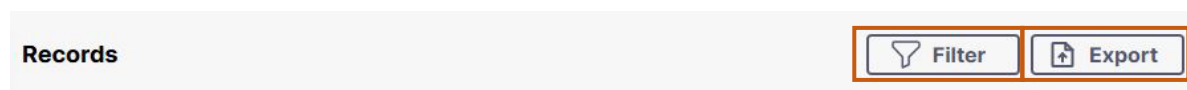
Records of Assessments

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”.

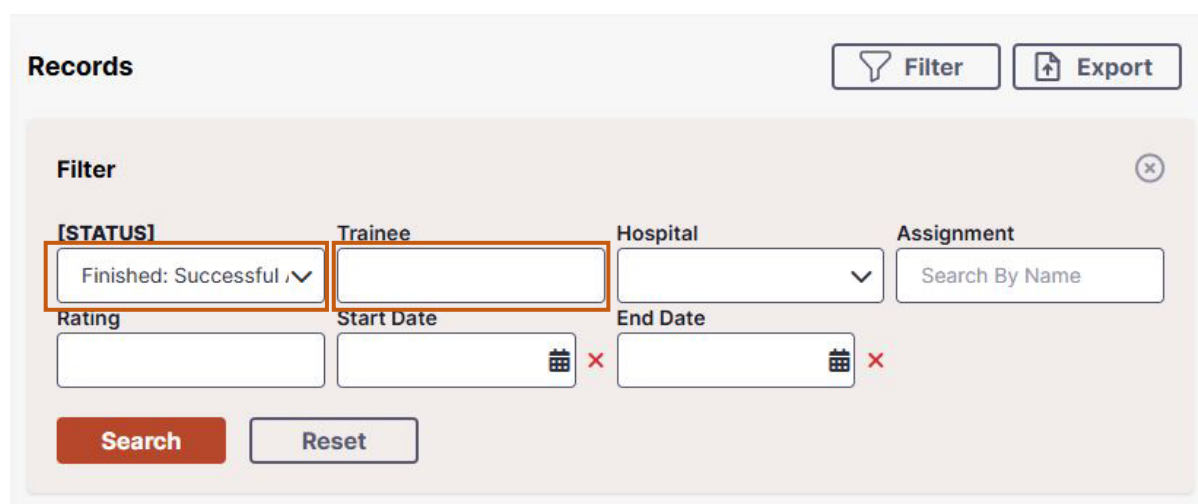
[Fig. 25]



[Fig. 26]



[Fig. 27]

A screenshot of the 'Records' page with the filter menu expanded. The filter menu has a title 'Filter' and a close button. It contains several fields: '[STATUS]' with a dropdown menu showing 'Finished: Successful', 'Trainee' with an empty text box, 'Hospital' with a dropdown menu, and 'Assignment' with a search box labeled 'Search By Name'. Below these are 'Rating' with an empty text box, 'Start Date' with a calendar icon and a red 'x', and 'End Date' with a calendar icon and a red 'x'. At the bottom of the filter menu are 'Search' and 'Reset' buttons.

- ❖ **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]

Filter ✕

[STATUS] Trainee Hospital Specialty

Assignment Rating Start Date End Date

No. of Assignment: 39

Trainee	Specialty	Assignment	Hospital	Rating	Status	Updated At	Current Task
Trainee 1	General Surgery	[HST] Logbook GS Jan-Jun 2024	Alice Ho Miu Ling Nethersole Hospital	-	Finished: Completed Assignment	26/06/2024 16:21:16	-
Trainee 1	General Surgery	[HST] Logbook GS Jan-Jun 2024	Alice Ho Miu Ling Nethersole Hospital	-	Finished: Completed Assignment	26/06/2024 16:09:46	-
Trainee 3	General Surgery	[BST] CEX	Alice Ho Miu Ling Nethersole Hospital	Level 3	Finished: Completed Assignment	19/06/2024 15:44:28	-
Trainee 3	General Surgery	[BST] CBD	Alice Ho Miu Ling Nethersole Hospital	Level 3	Finished: Completed Assignment	19/06/2024 15:43:18	-
Trainee 3	General Surgery	[BST] Surgical DOPS	Alice Ho Miu Ling Nethersole Hospital	Level 3	Finished: Completed Assignment	19/06/2024 15:41:28	-
Trainee 3	General Surgery	[BST] Endoscopic DOPS	Alice Ho Miu Ling Nethersole Hospital	Level 3	Finished: Completed Assignment	19/06/2024 15:39:24	-
Trainee 2	General Surgery	[BST] CEX	Alice Ho Miu Ling Nethersole Hospital	Level 3	Finished: Completed Assignment	19/06/2024 15:33:41	-

Filter ✕

[STATUS] Trainee Hospital Specialty

Assignment Rating Start Date End Date

No. of Assignment: 23

Trainee	Specialty	Assignment	Hospital	Rating	Status	Updated At	Current Task
Trainee 1	General Surgery	[BST] Logbook	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	26/06/2024 18:41:46	Logbook Submission
Trainee 3	General Surgery	[BST] Half-yearly Assessment 2024	Alice Ho Miu Ling Nethersole Hospital	4=Above Average	Created: Assignment in Progress	19/06/2024 15:46:01	Endorse trainee's assesement
Trainee 3	General Surgery	[BST] Surgical DOPS	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	19/06/2024 15:41:41	Submit Assessment form
Trainee 3	General Surgery	[BST] Endoscopic DOPS	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	19/06/2024 15:40:10	Submit assessment form
Trainee 2	General Surgery	[BST] CBD	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	19/06/2024 15:34:26	Submit CBD Form
Trainee 2	General Surgery	[BST] CEX	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	19/06/2024 15:33:57	Assessment form by Trainee
Trainee 2	General Surgery	[BST] CEX	Alice Ho Miu Ling Nethersole Hospital	-	Created: Assignment in Progress	19/06/2024 15:33:46	Assessment form by Trainee

❖ **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