1) Getting an account, logging on and moving around

Getting an account

To get an ePortfolio account, please email eportfolio.nm@nes.scot.nhs.uk with your name, email address, profession(s), and where you currently work in Scotland.

You will receive an automatic email response asking you to complete a form with the details we need to register your account. Please read and follow the instructions provided in this email. *NB there is an important note for hotmail and live email users.*

You will be asked if you mentor pre-registration students for an additional section for annual updating and triennial reviews.

In order to log on to the ePortfolio you will need your username and password.

You will receive your user name and password directly from the administrator or via an automated email.

Logging into ePortfolio

Open your internet browser e.g. Internet Explorer, Firefox etc. and enter [www.nhseportfolios.org](http://www.nhseportfolios.org) in the address bar.

On the right hand side of the screen a user login box is displayed - enter your username and password in the appropriate fields. Once you have filled in these details select the 'Log In' button.
When you log in to ePortfolio for the first time you will be prompted to change your password (you must also verify that your e-mail address is accurate and valid).

**NB Your email address is your unique identifier**

If you want to change your password again at a later date, you can do this by clicking on the ‘Profile’ drop down menu and selecting ‘Personal Details’. Enter your old password in the appropriate field and then enter your new, memorable, password twice in the appropriate fields.
Getting around: An Introduction to Navigation

The site is divided into six sections across the top of the page as shown below and there is a drop down menu for each one.

If you click on the menu header i.e. Evidence Forms you will be given a list of items under that menu to choose from as shown below.

If you move away from your home page simply click on the ‘house’ symbol as shown below and this will take you back to the home page.
2) Updating your personal details

The ePortfolio holds a page containing your personal details. You can change these yourself at any time.

To start, log into ePortfolio and navigate to the ‘Personal details page’.

![Personal Details Page]

To edit any of the details, click the ‘edit details’ button at the bottom of the page. This will take you to a new page where you can edit your details. Change or add any text to the page and click ‘save changes’ to save the changes. Click ‘cancel’ to discard the changes.
YOUR email is IMPORTANT

Your email address is your unique identifier on ePortfolio and is used to prevent duplicate accounts being set up.

It can be a work or home email address but it is important that the one you want to use has the correct spelling in your personal details section. If you forget your password, you can reset this at any time through the Log In page, and a temporary password will be sent to the email address recorded in your ePortfolio account.
3) Using the personal library

ePortfolio holds an area called the personal library where you can store various documents. The types of items that can be uploaded to your Personal Library include word documents, powerpoint presentations; PDFs, images etc.

To start log into the ePortfolio and navigate to the ‘Personal Library’ page.

You can upload files to your ePortfolio account via the Personal Library. Here you can create folders to help organise your uploaded files, and you are able to Link files to other evidence stored within your account (see section 4).

To create different folders to store your various documents click on ‘Create new folder’. If you wish to create a folder within a folder, then highlight a folder and then click on ‘Create a folder’. 
To Upload a file into a folder select ‘Upload a File’ from the drop down menu in the ‘Actions’ button for the relevant folder (see above).

The following screen will appear. Click on ‘Select’ and select the file you want from your computer, add a description if you wish, and press “save”.
**Actions within the Personal Library**

To perform an action on the uploaded file, click on the ‘Actions’ button for the file. This will give you the option to view, edit, delete or create a link to the file.

The maximum upload limit per user is 200MB – this is quite a lot but if you want to add lots of larger files you can shrink them by saving them as a PDF, zipping them, compressing the size of images etc.

Your local IT provider may be able to help you with these actions.
4) Completing Evidence Forms to record CPD activity, reflections and feedback

The Evidence Forms section includes a range of forms that provide you with an easy and consistent way of recording evidence of any CPD activities that you may have undertaken, reflections or feedback that you have received.

You can access the Evidence Forms section from the home page main menu bar or the 'Quick Links' box displayed on the right hand side of the home page.

On selecting Evidence Forms you will be given a further drop down menu. Selecting ‘Summary Overview’ is a good place to start as this will provide you with the full range of evidence forms available on ePortfolio. Choose the form that best suits your needs.

Some of the key forms include:

- Record of learning hours and activities
- Reflective account
- Support and supervision
- Feedback from others
- Custom forms
- The NMC forms for renewing your registration are also included

To create a new form select the type of form you want to use then click on ‘+ Create’. In the example below you will see that the Feedback from Others (self completion) form has been selected.
Your chosen form will then appear and you can type in your information. Once you have finished entering your information click on the ‘Save’ button at the bottom of the form.

This message will appear as a warning but you do not need to be concerned, you will be able to edit these forms once saved.
When you save your completed evidence form, you will automatically be given the option to link your form with other information within your ePortfolio e.g. a file in your personal library.

For example, you may have completed a reflective account form following a workshop you attended and you may want to link your reflective account form with the notes you made from the workshop that you may have saved in your personal library. This is really just a reminder for your own use.

If you don’t want to link your evidence form click on the ‘Continue’ button.

To read or edit your evidence forms in the future go to the ‘Summary Overview’ section and click on the relevant form box. This will then take you to a list of forms that you have completed in this section.

For information about how to download and print your evidence forms please refer to section 7.
5) Requesting Feedback from Others

In addition to the Feedback from Others (self completion) Form illustrated in Section 4, you can also use your ePortfolio to request feedback directly from another person e.g. a supervisor or colleague. Please discuss this in the first instance with the person you are seeking feedback from, and do not use to obtain feedback directly from patients, service users or carers. It is better to get the feedback and use the Feedback self completion for this purpose.

From the main menu select the ‘Evidence Forms’ drop down menu then select ‘Feedback From Others’ and click on ‘Request External Feedback’.

This will take you to a new page, click on the ‘Request New Feedback’ button.
A ticket request page will be displayed (as below) and you will be guided through the process of requesting feedback in three steps. At the end of the process the person that you are requesting feedback from will receive an email with a unique code or 'ticket' so that they can login to ePortfolio, complete and submit the requested feedback form.

Step 1: Click in the ‘Feedback From Others (External Person)’ box then click on ‘Next’.
Step 2: Type in the email address of the colleague that you wish to request feedback from and then click on ‘Next’.

Step 3: Type in your message to the person you are requesting feedback from in the ‘Details of feedback request’ box and the click on ‘Finish’
What happens to the external request?

Please note the person only has access to the feedback form. The unique code or ticket will expire 30 days after it was created and an external person will no longer be able to complete the form.

You can send the person a reminder if the feedback has not been completed within 7 days. To do this, from the main menu select the ‘Evidence Forms’ drop down menu then select ‘Feedback From Others’ and click on the ‘Request External Feedback’ and click on ‘Send reminder’.

Once the recipient has completed and submitted the feedback form, you can access and view the form by selecting ‘Profile’ from the main menu then select ‘My Filled Forms’. You will be sent an email advising you when the form has been completed.
The Nurse and Midwifery Career Long ePortfolio contains a personal and professional profile which can be used to store information about employment, career, academic and professional achievements.

The information can be built up over time and extracted when needed, be that for curriculum vitae, job application form or any other reason.

To start, go to the Profile and then ‘Personal and Professional Profile’ page of your ePortfolio.
Part one: Setting up your profile

The first thing that you have to do is to enter your ‘profile items’. This represents small chunks of information about you. They can be jobs you held, qualifications you’ve gained, details about you, references and many other things. First select the type of profile item you want to create from the drop down list of ‘Additional Information’ then click on ‘Create new Profile item’:

You will be presented with a form to fill in that corresponds to the type of profile item you have chosen (below is an example of the ‘education and training’ form). At the top of the form is an area for you to enter a title and description of the profile item so that you can find it again and distinguish it from other profile items of the same type.
The rest of the form allows you set out your achievement, qualification, etc. After completing a form hit the ‘save’ button. Another screen will inform you that your form has been saved and you will be given the opportunity to create a ‘link’ to another item such as a certificate you have saved in your personal library (See Guide 4 for information on adding links). Your form will be entered into your profile item list on the main PPP page.

**Part 2: Generating a PPP**

Once you have set up your list of profile items, you can use some or all of them to generate a ‘Personal, Professional Profile’ document (a PPP). Start by clicking the ‘Generate new PPP’ button on the Personal and Professional Profile’ page.
You will need to give your PPP a title and then select which items you wish to include in this PPP from a list of available items. To select an item check the tick box next to the item and click the green arrow between the two boxes to add it to the right hand box. Once all the items that you want to include in your PDF are in the right hand box, click the Create PPP button to generate the PPP.

This will save the PPP into your list of saved PPPs.

From this list you have three further options; you can View, Edit or Delete the PPP by selecting the relevant link from the drop down menu in the ‘Actions’ box. Editing the PPP will give you a chance to change the title of the PPP that appears in the ‘Description’ box.

You can also select to View the PPP, this will download and open the PPP in a new window using your computer’s standard PDF viewer.
7) Printing and sharing your ePortfolio contents

You can download and save a PDF containing a selection of any ePortfolio information you choose. You could then use this as evidence for interviews, assessments or even your confirmers meeting.

Selecting the evidence forms

To begin, navigate to the ‘Download’ portfolio page in the ‘profile’ menu of your ePortfolio. Then click on the green “create” button.

To access your evidence, click on the “forms” button which will allow you to select which parts of your ePortfolio you wish to download from a list of available items.
Now, highlight the pieces of evidence you want to include in your PDF (hover over them to allow you to see the titles) then click on the right pointing arrow between the two boxes to add it to the right hand box. You can also click the Select All link to move all the items at once.
Generating a PDF of your evidence

Once all the items that you want to include in your PDF are in the right hand "selected items" box, click on the green "create PDF" button to produce your PDF. This can take up to 1 minute and the webpage will confirm once this is complete.

Managing the Portfolio evidence forms

Once generated the PDF will be added to your list of PDFs Available for Download (see below).

The list will include details such as the date that the PDF was created. There is also a list of ACTIONS: so you can Editing the PDF to add a title that will appear in the 'Description' box.
Share your evidence with others

You can also select to View the PDF which will then allow you the option to Save it to your Downloads folder or desktop.

Thereafter, you can choose to attach the PDF it to an email and send if required.

There is also a function to “Share” this portfolio evidence electronically for a period of time. You will see a link that you can send to your manager, supervisor and the NMC if required.

The person who receives this link can then download the PDF of your evidence.
8) Changing your location

Introduction

You can change your employing organisation (i.e. location) on your ePortfolio from NHS Scotland to your specific NHS Board, or to another location if you move from one organisation to another. Changing your location will not have impact on how you use your Nursing and Midwifery ePortfolio.

How to change your location

1. Select – “Profile” then “Portfolio Details” (see screen grab a)
2. Select the Edit button alongside the details you want to change (screen grab a)

Screen grab a
3. Change the location and select next (see screen grab b)

Screen grab b

4. Confirm or change your Portfolio name and select finish (see screen grab c)

Screen grab c
9) Organising your portfolios

Introduction
It may be helpful to think of your portfolios as drawers within a filing cabinet (the Training Programme). You can create a number of Portfolio ‘drawers’ to store evidence in a way that works for you, e.g. you may wish to have a different portfolio for each 3 year period of NMC revalidation.

To start organising your portfolios you may wish to change the dates of your “Training Programme”. You only need one “Training Programme” (or cabinet) to keep all your portfolios within but the start date will determine the earliest date you can select for your portfolio.

How to change your Training Programme dates

Select “Profile” then “Portfolio Details” then select “Edit” in the main section box.

Select “Edit”
Edit the dates using the earliest date you want your first portfolio to start from and leave the end date empty. Then select “Update”

How to add a new portfolio or change dates of an existing portfolio

Select “Profile” then “Portfolio Details”
To change dates on an existing portfolio select the “Edit” button alongside the portfolio you want to change
Or select “Add Portfolio”

Enter the dates you want for your portfolio and select “Next”. The dates you select must be within your Training Programme dates and not overlap with an existing portfolio.
Choose a name for your portfolio and select “finish”

If it will not allow you to change the dates, ensure you are entering dates within your training programme dates.