

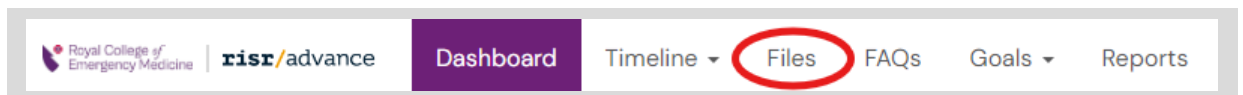
Changes to the risr/advance ePortfolio platform

On 02 July 2024, risr/, the provider of the RCEM ePortfolio platform (risr/advance) completed a system-wide upgrade which has changed the way in which documents are uploaded. As part of this upgrade, the document library has been replaced by a read-only **Files** area, and the ability to attach a document as a 'comment' to a completed event has been removed. The function of being able to attach a document when creating an event remains.

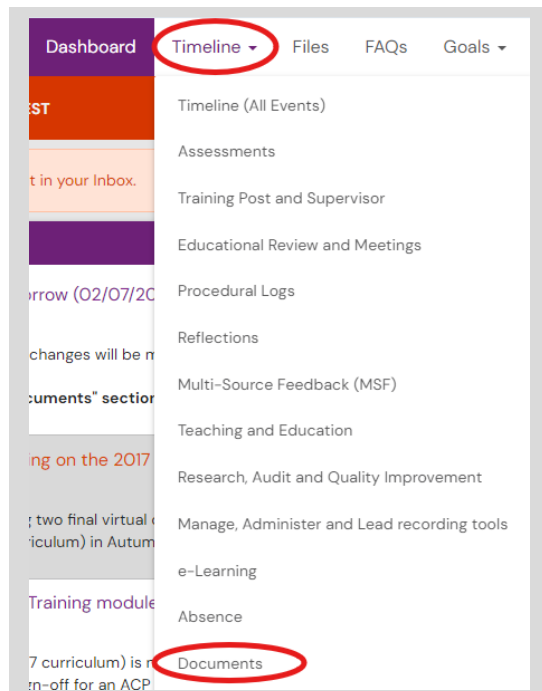
To help you to manage these changes to the ePortfolio platform, we have created some guidance that we hope will make this new process easier to navigate. If after reading this guidance document, you have any questions or concerns regarding your credentialing submission, please email ACP@rcem.ac.uk. If you require technical assistance with the ePortfolio platform, please contact the ePortfolio team by email at ePortfolio@rcem.ac.uk or by telephone on +44 (0)20 7038 7477, Mon-Fri 09:00-17:00.

1. Files area

The new **Files** area can be accessed from the horizontal menu along the top of your portfolio, either by clicking on **Files**:



Or by selecting **Documents** from the **Timeline** drop-down options:



All of your existing files that had been saved to the document library have been moved across to the new **Files** area for you; you do not need to do anything. No evidence will have been lost, and all existing tags and links have been retained; any files that you had already linked to the curriculum, checklist (2017 ACP curriculum) and clinical syllabus (2022 ACP curriculum) will still be there.

2. Searching for files previously uploaded to the document library

You can search for these files in two ways, depending on whether or not you had previously created a folder structure within the document library.

a) Files previously saved to folders in the document library

If you had created a folder structure within the document library, the folder name will now be incorporated into the new file name, e.g.

Original folder name	Original file name	New file name
Academic qualifications	MSc transcript.pdf	Academic qualifications/MSc transcript.pdf
Life support courses and mandatory courses	APLS certificate 2024.pdf	Life support courses and mandatory courses/APLS certificate 2024.pdf
Patient logbook	ACP1 summary table.pdf	Patient logbook/ACP1 summary table.pdf

To find all the files that had been saved to a specific folder, enter the name of that folder, e.g. *Academic, Life Support, etc.* in the search field within the **Files** area, **Timeline (All Events)** or **Timeline (Documents)** and click 'search'.

Files

If you want to filter your search results by date, or file type, e.g. PDF, Word document, etc., you can use the 'Advanced Search' fields to the right of the screen.

^ Advanced search

File Types

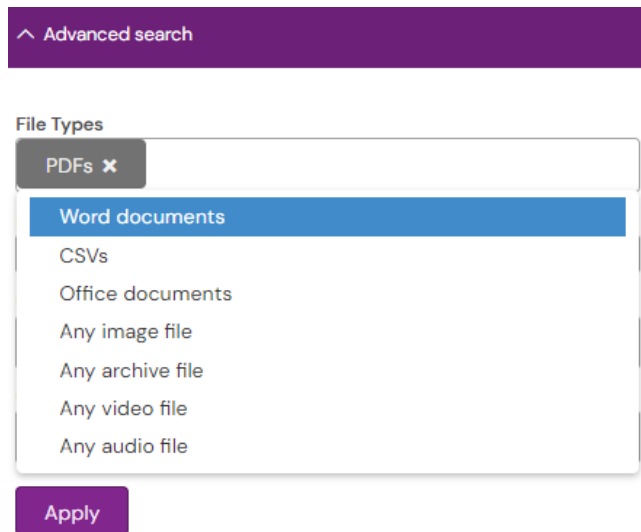
Event type

Created date from

Created date to

Apply

By clicking in the 'file type' field, a list of file formats will appear. Select the appropriate file type. You can select multiple formats by clicking again in the search field.



Advanced search

File Types

PDFs x

Word documents

CSVs

Office documents

Any image file

Any archive file

Any video file

Any audio file

Apply

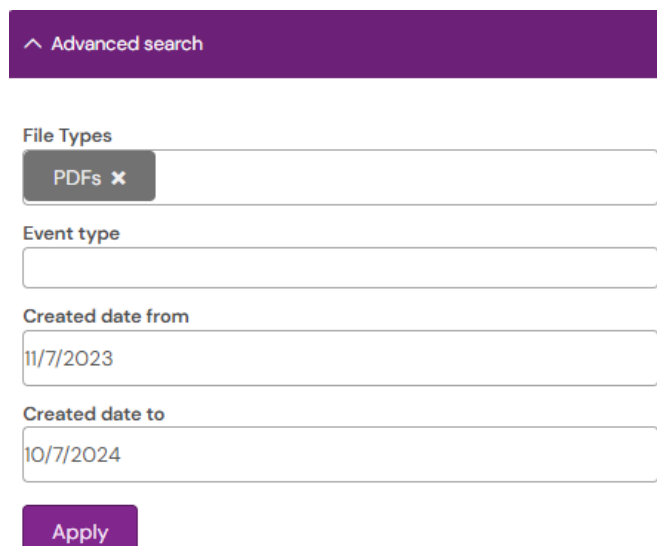
To select a date range, click in the 'created date from' and 'created date to' fields. For example, you may want to see everything you uploaded during the previous 12 months, or you may want to locate your latest ALS certificate which you know was completed in the second half of 2023.

b) Files not saved to folders in the document library

If you had files within the document library that were not saved to a specific folder, these files will have the same name that you originally gave them, i.e. the file name will not include the name of a folder as above. To find a specific file, you can either:

- i. Scroll through the list of titles within the **Files** area or **Documents** section of the **Timeline, or**
- ii. Enter the name of the file (or keywords from the title) into the search field.

As in a) above, you can also search and filter by date or file type using the 'advanced search' options, e.g.



Advanced search

File Types

PDFs x

Event type

Created date from

11/7/2023

Created date to

10/7/2024

Apply

3. Viewing files

For image file formats (PDF, JPEG and PNG), you are now able to view a document without having to download the individual file. Click on **Preview** to view the document in a separate window. Please note that this function is not available for Word, PowerPoint or Excel documents. To view these file formats, you will need to download the file.

4. Viewing linked events

All existing tags and links have been retained. If you previously linked a document to a curriculum item, checklist section (2017 curriculum) or clinical syllabus item (2022 curriculum), then these will still be visible when you go to that particular area of the portfolio.

Within the **Files** area, you will also be able to see any events, such as a WPBA, that you have previously attached an individual document to. You can view that event by clicking on [View linked event](#)

For example:

The screenshot shows a file entry for a PDF document. The file name is "Library/Courses /RCEM Chest Drain Course Certificate". The document is linked to an event titled "EDUCATIONAL ACTIVITY ATTENDED". There are three callout boxes with arrows pointing to specific elements: one pointing to the file name, one pointing to the event link text, and one pointing to the "View linked event" button.

Type of event the file is linked to

File name: consisting of the name of the document library folder followed by the original file name

Click here to view the event

5. Uploading a document to the portfolio

To upload a new document to your portfolio, you will need to create an event type called **ACP Document UPLOAD**, which can be found in the 'What would you like to create?' menu. You can then attach your document to this event.

The screenshot shows the "New ACP Document UPLOAD" form. It includes fields for "Date occurred on" (10/7/2024) and "End date" (10/7/2024). There is a "Description (optional)" text area. Below the form, there is a section titled "ACP Document UPLOAD" with instructions and a "File category" dropdown menu.

New ACP Document UPLOAD

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Link to ...

Fields marked with * are required. LAST SAVED: UNSAVED

This event will be added onto your timeline as a SHARED event. Only users with permissions to view this event on your timeline will be able to view this event. Click here to change to private

Date occurred on * 10/7/2024 End date * 10/7/2024

Please indicate the date on which this event occurred. If this event spans multiple days, please indicate the date on which this finishes.

Description (optional)

ACP Document UPLOAD

Please use this event to upload any document or file that has not already been added to another event (i.e. to a WBA, Reflection, Procedural log, etc).

NB: This is not a substitute for existing events.

Once submitted, this event will be viewable and searchable under the read-only FILES section and under the relevant Timeline category.

File category *

ACP Year

Within the event, you will be prompted to select certain options to make it easier for you, your supervisors and, if credentialing, the Panel, to search for specific files within the **Timeline (All Events or Documents)**. For example, you will be asked to select a file category, e.g. academic, CV, teaching and education, mandatory courses, etc. in much the same way that you would save files to a named folder.

Please complete each field within the event in order as some fields are ‘conditional’ and will provide further options depending on the option chosen.

If you are on the credentialing pathway, we would suggest you categorise your evidence as follows (**please note:** provided examples are not an exhaustive list)

File category	Evidence examples
CV	Your CV
Academic	Masters/PGDip transcripts and certificates, non-medical prescribing transcripts and entry on the relevant professional register
Annual appraisal	Trust annual appraisals, annual record of progress (if not using the RCEM ARP form)
Mandatory courses	Life support, safeguarding and GCP certificates
eLearning	eLearning module certificates, podcasts, online journals, blogs/vlogs
Teaching and education	Evidence of your teaching – lesson plans, feedback from learners, presentations, etc. Formal courses and local teaching sessions attended.
Research, audit and QI	Research, audit and QI project plans, reports, presentations, data, reflection, guidelines you have written, RCEM audits
Manage, administer and lead	Minutes of meetings, projects for management and leadership, staff rotas, materials for recruitment processes you have participated in
Patient logbook	Yearly summary tables detailing your patient contacts
Other	Any other evidence that cannot be easily categorised

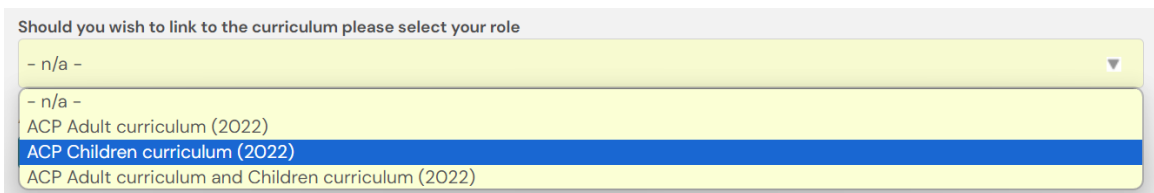
If you select ‘Mandatory Courses’ or ‘eLearning’ as the file category, you will also be asked to enter the date you completed the course or module, and the expiry date (if applicable).

You will also be given the option to select an ‘ACP year’, e.g. ACP year 1, ACP year 2, etc. This field is not mandatory, and you may leave it as *-n/a-* if you prefer. Although ACP credentialing is not a formal training programme, completing this field will enable you to search for files uploaded within a specific ACP ‘year’ without having to enter start and end dates in the search fields.

Please ensure you give your file a name that will be easily searchable for yourself, your supervisors and for the Credentialing Panel. The same name should be given to both the document saved to your device (prior to uploading to the portfolio) and to the 'title of document' within the **ACP Document UPLOAD** event to make searching easier.

You may upload more than one document to an event by clicking on the 'upload' button for each file you wish to attach. **Please upload your documents as PDF files wherever possible.**

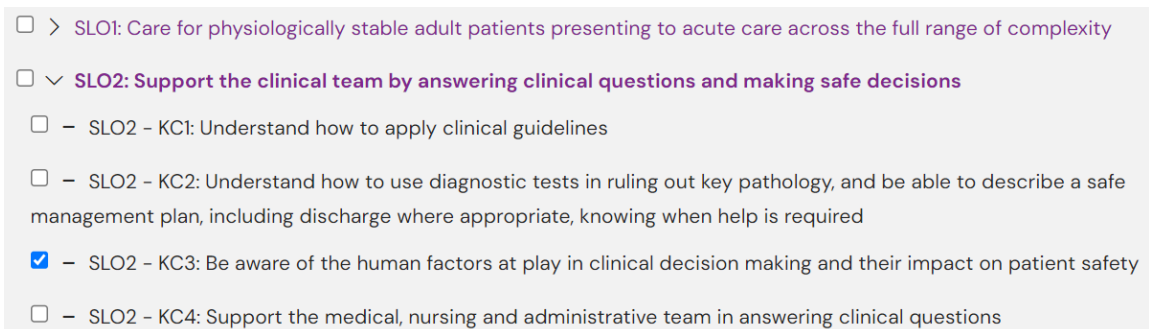
If you are on the 2022 ACP curriculum pathway, you will be given an option to link your file to a specific SLO/KC. To link to a curriculum item, select your role from the drop-down options provided (ACP Adult, ACP Children, or ACP Adult and Children) to display the appropriate curriculum:



Should you wish to link to the curriculum please select your role

- n/a -
- n/a -
- ACP Adult curriculum (2022)
- ACP Children curriculum (2022)**
- ACP Adult curriculum and Children curriculum (2022)

Then select the SLO/KC by expanding the menu options, e.g.:

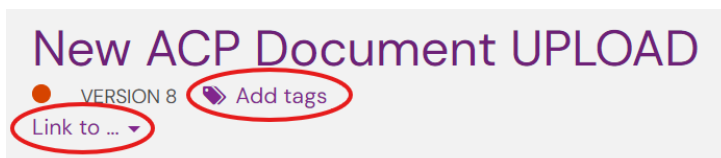


- > SLO1: Care for physiologically stable adult patients presenting to acute care across the full range of complexity
- v SLO2: Support the clinical team by answering clinical questions and making safe decisions
 - SLO2 - KC1: Understand how to apply clinical guidelines
 - SLO2 - KC2: Understand how to use diagnostic tests in ruling out key pathology, and be able to describe a safe management plan, including discharge where appropriate, knowing when help is required
 - SLO2 - KC3: Be aware of the human factors at play in clinical decision making and their impact on patient safety
 - SLO2 - KC4: Support the medical, nursing and administrative team in answering clinical questions

This is not a mandatory field, and you will still be able to link your file to the curriculum at a later date if you choose not to do so at the time you create the event. If you link events to the curriculum, you can use the advanced search function within the **Timeline (All Events or Documents)** to search for all files linked to a specific SLO/KC.

To tag to a clinical syllabus item, click on **Add tags** at the top of the event (you can also tag to the curriculum using this method).

To link to one of the procedural skills, click on **Link to....** at the top of the event.



New ACP Document UPLOAD

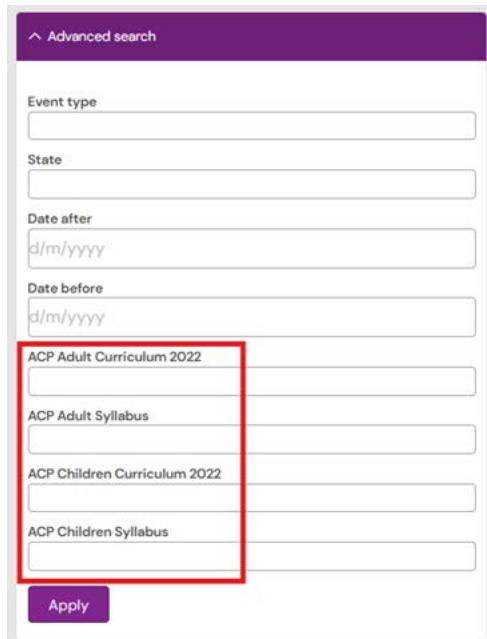
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Please note: the Document UPLOAD event for ACPs on the 2017 ACP curriculum does not include the option to link to the curriculum within the body of the form. Instead, you will need to use the 'add tags' and 'link to' options at the head of the form.

- Click on **Add tags** to tag to a curriculum item
- Click on **Link to....** to link to a curriculum or credentialing checklist item.

6. Search function

To search for files uploaded to the portfolio, you can use the search fields and 'advanced search' functions available within either the **Timeline (All Events or Documents)** or the **Files** area. However, we would always recommend that you search for documents within the **Timeline** as this option has added functionality that allows you to search by any field included in the **ACP Document UPLOAD** event, e.g. category, ACP year, etc. The 'advanced search' fields within the Timeline also enables you to search for files tagged to a specific SLO/KC or clinical syllabus item (2022 curriculum pathway only).



To search for documents that you have tagged to a specific ACP 'year' or category, please enter the appropriate keywords in the search field, e.g.



Please note: when using the search field in the **Files** area, you can only search by entering the document's original title, i.e. the name you gave the document when saving it to your device prior to uploading it to the portfolio, or keywords from the title. Therefore, you should always name (or rename) the file on your device so that it matches the name you choose when uploading it to the ePortfolio using the 'ACP Document UPLOAD' event.