Institute of Biomedical Science

Support • Progress • Promote

September 2023

REGISTRATION TRAINING PORTFOLIO V5.0

Onefile User Guide for TRAINERS

1 Portfolio Dashboard

The portfolio dashboard is accessed from your Onefile Home button in the left side menu bar. It contains information about your learning journey and links to other areas of your portfolio.

2 Key Information on your Dashboard

View calendar	**Calendar:** Here you can view any planned discussions and other calendar events so you never forget any scheduled appointments.
OVERALL AND TARGET PROGRESS	**Overall and Target Progress:** The dial here shows you where you are and the targets for where you need to be. You can keep a track of your progression here.
TASKS DUE Immediately 0 This Week 0 Next Week 1 In 2 Weeks 0	**Tasks Due:** Here you can see an overview of tasks due now (immediately), this week, next week or in 2-weeks time. Tasks in green are not yet do, amber are close to a due date and red are overdue.
My Portfolio Access your assessments, teaching, learning and assessment plans and progress.	**My Portfolio:** This provides access to your assessments, evidence, plans and progress. Click here to access your full portfolio (also available from the Portfolio tab in the left side menu bar.
Upload Evidence Upload evidence and link to assessments later.	**Upload Evidence:** Here you can create folders and files of evidence waiting to link to assessments at a later date.
Courses You have no new courses.	**Courses:** If you are assigned any interactive learning resources by your Training Manager/Training Officer you will see them here.
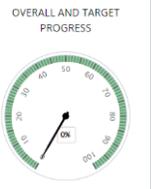
Tasks You have 1 new task.	**Tasks:** You will receive tasks here for you to complete. You will see this area highlighted if you have new tasks. You will also see a number next to tasks in the left side menu bar.
Messages You have no new messages.	**Messages:** Send and receive messages from those supporting your Onefile portfolio here. You will also receive messages related to feedback and tasks.
Witness Status Complete the witness status list.	**Witness Status:** This is where you will set up details of colleagues who witness evidence for your portfolio.
Resources Access online resources uploaded by your centre.	**Resources:** Documents, videos and links to webpages that will support you in building your portfolio will be shared with you here.

3   Assessment Team

Here you can see the assessment team that has been assigned to you.

Assessment Team

Jim Taylor
Primary Assessor
Offline

4   Other Options

At the bottom of your dashboard you can also find links to additional options such as:

- **My profile**

  Update your profile and personal details and add a picture.

- **Display settings**

  Customise the look of OneFile and change the appearance of text and colour schemes.

- **Email preferences**

  Make sure you stay notified of tasks and reviews that have been assigned to you by configuring your email preferences.

- **My activity**

  View all your portfolio activity logs

- **User Guides**

  Generic user guides from Onefile

- **Read System announcements**

  Announcements from Onefile and IBMS

5 Logging into your account
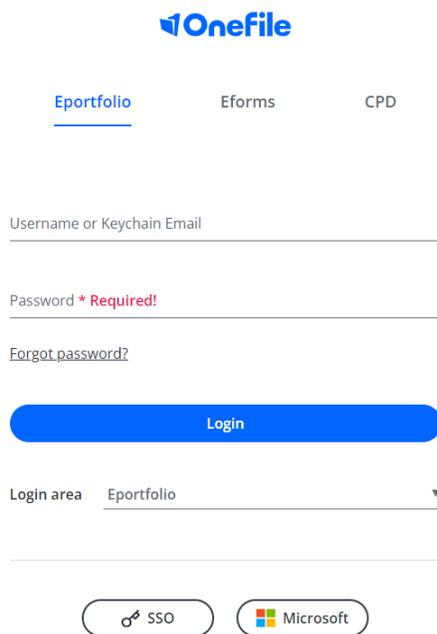
Log in at https://login.OneFile.co.uk and enter your **username** and **password**.

Your username will be the email address you registered with. You will be sent an initial email (please check SPAM/JUNK folders) and can then set your unique password.

Using your email address will create a **Keychain** which means you will see any other OneFile portfolios you have linked to that email address. You will need to select the collect account to see your IBMS eportfolio as a Trainer.

5.1 Homepage

When you log in for the first time you will need to accept the terms and conditions for OneFile. After this you will see any service announcements from the IBMS.

Initially, this will be your Welcome message.

You will then see your Dashboard – see section 6.1

6 Understanding key information on the Dashboard

Your homepage displays a variety of graphics to indicate the status of your candidates, any tasks or deadlines pending for you, and summary progress tracking for all of the candidates assigned to you.
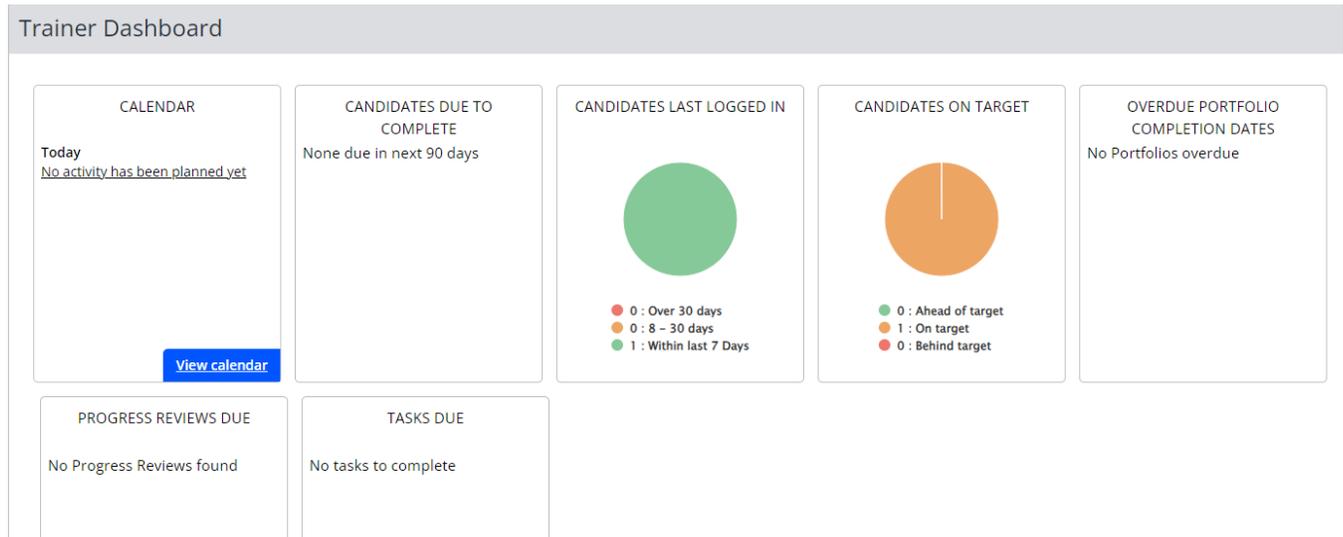
- The **Calendar** will show all your upcoming Tasks.

- The **Candidates due to complete** will show Candidates with a target end date within the next 90 days

- **Candidates last logged in** and **Candidates on target** shows a RAG rating for those outcomes.

- Any Candidates who are **overdue completion** are listed in the end chart.

- **Progress Reviews Due** lists any progress reviews to complete (not used in this programme)

- **Tasks Due** lists the tasks for you to complete

6.1   Sidebar icons

Some of the sidebar icons are also on your Portfolio Dashboard page, such as:
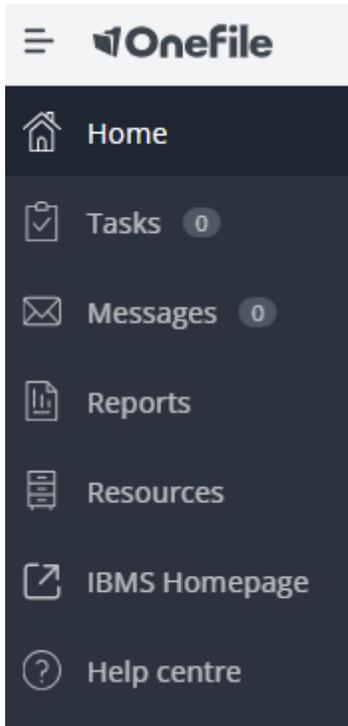
Home - (for the Dashboard)

Tasks – anything requiring action.

Messages – any messages received.

Reports – list of generatable reports.

Resources – IBMS shared resources.

IBMS Homepage – Link to the IBMS website.

Help Centre – access to OneFile generic help pages.

6.2   Viewing your Candidate details

From the Home page scroll down to the Candidate Dashboard heading and open this using the arrow at the side of the heading panel. This will show the details of Candidates assigned to you.

You can filter to search for specific routes i.e., different programmes. Or you can search for a Candidate name.

You will see an overview of targeted progress by your Candidates.

Click into any hyperlinked Candidate name to access their portfolio.

6.3   Forms & Templates

This section contains the Assessment Templates, Candidate Forms, Training Plan Templates and Written Question Forms. You will not need to concern yourself with some of these icons. Others we will cover when assigning work to Candidates.

6.4   Other Options

At the bottom of your Dashboard you can also find links to additional options such as:
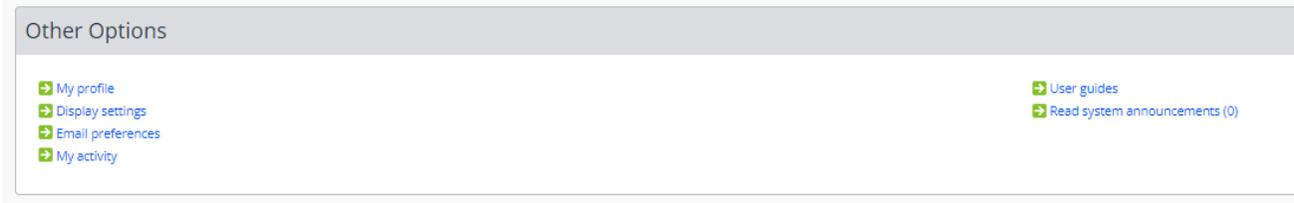
My Profile – update your profile and personal details here. Add a profile picture.

Display Settings – customised the look of OneFile changing the appearance of text and colour schemes.

Email Preferences – make sure you stay notified of tasks that require your attention. Configure email notifications here.

My Activity – view all your activity logs.

User Guides – view the user guides from OneFile.

Read System Announcements – select this to read updates from OneFile. If there are announcements a number will appear in the bracket at the side of this section.

7   Completing your First Task

When you log in for the first time you will receive your first task! You will see this task in the side menu.
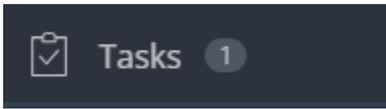
Tasks 1

Your first task is to complete your Trainer profile as follows:

- Click into the task side menu bar or Task icon to access the task.

- You will see a message asking you to 'Please update your profile', as shown in the example below.

Date Set	Task (click to open)	Date Due	Date Completed	Options
14/08/2023 13:34	Please update your profile information	28/08/2023 13:34		Hide

- Click into the hyperlinked task.

- Upload a new profile picture. It is important that you set a picture of yourself so that those accessing your portfolio build a connection with you. To upload a picture, browse your files to upload an image of yourself you are happy with.

7.1   My Details

- Enter any details you are happy to complete.

- Check the time zone is correct for Dublin, Edinburgh, Lison. London

7.2 Attachments (CV, qualification certificates & other professional documents)

- Upload certificates of ....<mark>Jim to confirm what we need evidence of here</mark>

7.3 Email Preferences

| My Profile | Email Preferences | My Activity | Privacy |
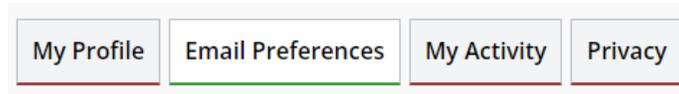
- Click onto the tab at the top of the page for Email Preferences

Your primary email address will be set as the email address your registered with and your Keychain email. This will be a work email address.

+ Add new email

If you wish to add an email address to this account, for example a personal email address, then you can add a new email address be selecting this button and filling in the fields.

7.4 Email Alerts

To keep on track with your portfolio you should set the system to send you emails on each of your **working days** and always include the **Tasks to do** and **Unread messages**. As shown in the image below:

Daily Digest

Send on these days:
☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☐ Saturday ☐ Sunday

Include this content:
☑ Tasks to do
☑ Unread messages

Send now
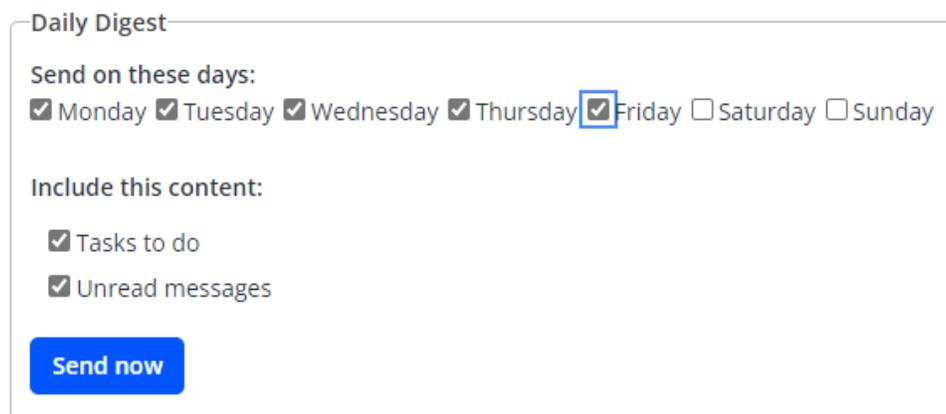
- Click Save

You have now completed your first task and you will now see the task side menu bar has a 0 next to the Task icon. Well done!

8   Assigning a Training Plan to your Candidate

It is **not normal practice** for Trainers to assign assessment plans to Candidates as this will be completed by the IBMS digital team at the set-up of a Candidate's portfolio.

Below are instructions on how you can do if instructed by the IBMS to do so.

- Log into your OneFile account as a Trainer

- Scroll down the Homepage to the Forms & Templates section.

- Click on the Training Plan Templates icon (lightbulb below)
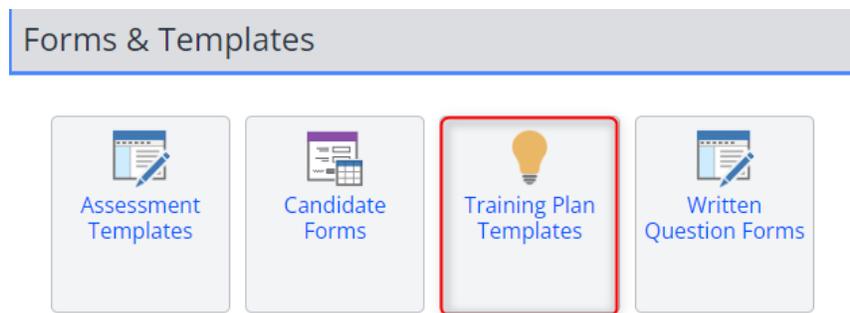
- In the search box enter the three letters from the table below, which corresponds with the four routes to registration that the IBMS is approved to deliver. "REG" will be the most common selection.

  Note! It is important to select the correct route to registration as the arrangements for verification vary between routes, as does the evidential requirements to meet the HCPC Standards of proficiency.

Code...	Choose this option for...
REG	Placement students and those completing their Registration Training Portfolio after graduation
EQU	Graduates, or people in-service who have been practicing at the level of a Biomedical Scientist but who are not yet HCPC registered and are completing the Registration Training Portfolio to seek registration by the equivalence route
INT	Integrated degree students – these are either L6 degree apprentices, or students who REQUIRE the Registration Training Portfolio to be successfully completed as part of their degree award.
NADA	Graduates who have completed a degree at a non-IBMS-accredited institution and have undertaken the process of non-accredited degree assessment.

- Locate the Training Plan you want to assign to your Candidates, for example:

Training Plan Template Name (Centre Ref)
[REG] Section 1 – Professional Conduct

- Click 'Assign to Candidate(s)' at the side of the Training Plan you want to release to your Candidate(s)

- From the Drop Down List select 'All Training Routes'

- The Candidates you can assign this Training Plan to will be shown in the list. Note: Candidates who have already received this Training Plan will not be shown in the list.

- Check the box next to the name of each Candidate you wish to assign the Training Plan to.

- Untick the 'Set Next Planned Visit'

- The dates for the assessment plan will be automatically set as today's date for the Start Date and 999 days from then for the Due Date. This is to enable Candidates to work holistically on all aspects of the portfolio at the start of the programme and prevent the submission of evidence greater than 3 years old.

- The dates can all be left as default.

- Scroll to the bottom of the page and tick the box to sign the assessment and click Assign

The Training Plan is now with the Candidate to accept and begin collecting evidence.

9   Assessing Evidence

When your Candidate submits their evidence, the Trainer will receive a task informing them that the work is complete.

The Trainer can then assess the evidence, confirm the criteria and leave feedback. Evidence can be resubmitted (returned) back to the Candidate for additional work or signed off as achieved.

- Log into your OneFile account as a Trainer.

- Select 'Task' from the side menu bar.

- You will be presented with a list of all the work you have to assess.

- Click into an assessment title to open the evidence presented.

- Read the Task Overview section to understand the Candidate requirements for the task and therefore what you will be assessing.

- The criteria for the evidence will have been assigned in the template creation by the Centre Manager at the IBMS. For mandatory evidence you will not need to make any changes to these criteria. For the Candidate choice evidence, you may need to make changes to the assessment criteria, depending on work presented (see later).

- Scroll to the Evidence section. Review any written or attached evidence from the Candidate. Attachments will either load in a pop-up window or be downloaded depending on the format.

- Once you have assessed the evidence, you should leave constructive and specific feedback for the Candidate. To add evidence of a witness at this point please see instructions below.

- If the Candidate has **successfully completed** the task and the feedback will be final for this task i.e., there is no further work required, then tick the 'Create task to acknowledge this feedback' button so the Candidate reviews

all feedback given (as shown in the image below).

- If **further work** is required, do not tick this option as the Candidate will receive a task for further work on this task anyway. Ensure you provide clear instructions to the Candidate on what additional work is required.

- If you wish to record the time you have spent on the assessment of this work, please enter the minutes you have spent in the Timesheet box.

- To **resubmit** the evidence back to the Candidate for further work, **do not sign** the assessment and click the **Resubmit** button.

- To **sign off** the evidence as complete tick next to your name and then click **Save & Quit.**

- You will now return to the assessment page and can repeat steps to continue to assess any further work from this Candidate.

9.1 Updating assessment criteria on Candidate choice evidence

Candidate choice evidence for each module needs to cover, across the two submissions, the assessment criteria indicated in the task.

It is not possible for the Centre Manager to know which assessment criteria are covered prior to the agreement of the evidence and submission. For this evidence Trainers will need to remove any assessment criteria not covered by the submission.

To do this, following point 7 above, click into the 'Set Criteria' button (shown in image below) and deselect (untick) any highlighted assessment criteria assumed at creation of the centre template but not covered by the evidence presented (see image below).
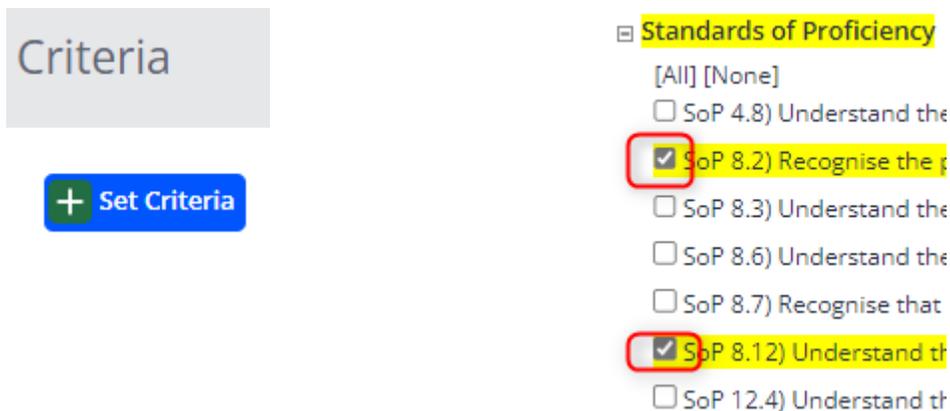
9.2 Adding a witness to evidence submission

The Candidate has the option to select a single witness for their evidence submission. If they have not done this, or have chosen an incorrect witness, you can add or alter this whilst assessing the evidence.

Following point 8 above, select a witness from the **drop-down list** that you have discussed the Candidate work with.
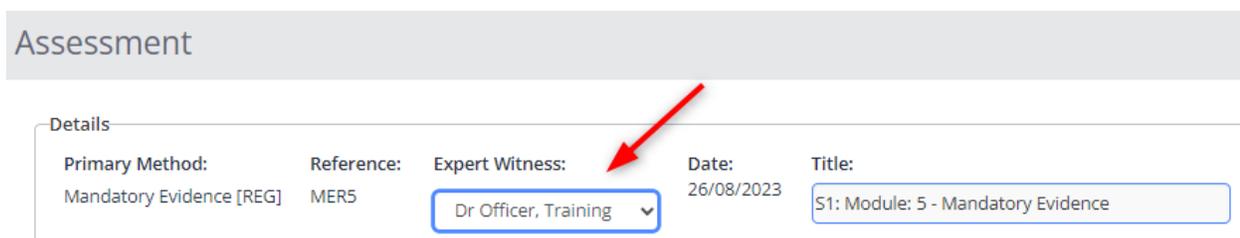
If the witness you have discussed the work with is **not in the drop-down list**, you can manually add them here as follows:

- From the evidence page click into the Candidate name in the breadcrumb menu to return to the Candidate Portfolio.

- Click into the Manage tab and Expert / Witness icon as shown in the image below
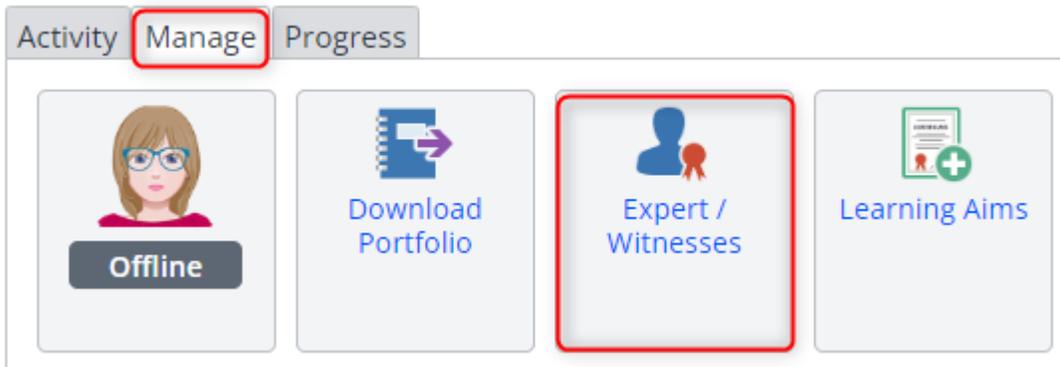
- Select 'Create a New Witness' from the blue button at the top of the witness details already entered.

- Select 'Witness' from the radial button at the top of the form.

- Complete the form with the witness details.

- Sign the form and click Save.

Return back to the evidence via the Tasks where your new witness will now be available to select for this evidence.

10 Signing off modules

When a Candidate has achieved the mandatory and Candidate choice evidence for each module, and achieved the minimum assessment criteria for that module, the module will move to 100% completion.

To sign-off the module, you should:

- Log into OneFile as a Trainer

- Click on the Tasks in the side menu bar.

- Click into the assessment title to open it.

- Scroll to the feedback section and feedback to the Candidate on their completion of this module.

- Sign the summary and save it.

- This task will **not** go to the Candidate for them to accept the feedback and sign the module off.

Once this process has been completed by both the Candidate and the Trainer, the module progress will change to contain the words 'Trainer' and 'Candidate' to indicate it has been signed off. As show in the example below:

[Section 1 - Module 2] Equality, Diversity and Inclusion	0	TRAINER	CANDIDATE

Module sign off will be completed when the Verifier has checked the completed portfolio and signed off each module in addition to the Candidate and Trainer.