



REGISTRATION TRAINING PORTFOLIO V5.0

Onefile User Guide for
CANDIDATES

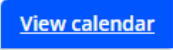
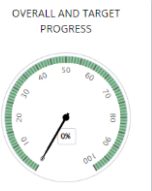
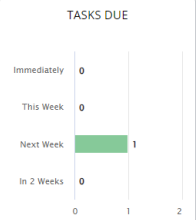



1 Portfolio Dashboard





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.

The screenshot shows the Portfolio Dashboard interface. At the top, there is a header 'Portfolio Dashboard'. Below it, a box indicates 'You are working towards: Registration Training Portfolio (V5) (IBMS1)'. The dashboard is divided into several sections:

- CALENDAR:** Shows 'Today' with the text 'No activity has been planned yet' and a 'View calendar' button.
- OVERALL AND TARGET PROGRESS:** A circular progress gauge showing 0% completion.
- TASKS DUE:** A bar chart showing task counts: Immediately (0), This Week (0), Next Week (1), and In 2 Weeks (0).
- My Portfolio:** A button to 'Access your assessments, teaching, learning and assessment plans and progress.'
- Upload Evidence:** A button to 'Upload evidence and link to assessments later.'
- Courses:** A button indicating 'You have no new courses.'
- Tasks:** A highlighted yellow button indicating 'You have 1 new task.'
- Messages:** A button indicating 'You have no new messages.'
- Witness Status:** A button to 'Complete the witness status list.'
- Resources:** A button to 'Access online resources uploaded by your centre.'

2 Key Information on your Dashboard


	<p>Calendar: Here you can view any planned discussions and other calendar events so you never forget any scheduled appointments.</p>
	<p>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.</p>
	<p>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.</p>
 <p>My Portfolio Access your assessments, teaching, learning and assessment plans and progress.</p>	<p>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).</p>
 <p>Upload Evidence Upload evidence and link to assessments later.</p>	<p>Upload Evidence: Here you can create folders and files of evidence waiting to link to assessments at a later date.</p>
 <p>Courses You have no new courses.</p>	<p>Courses: If you are assigned any interactive learning resources by your Training Manager/Training Officer you will see them here.</p>

 <p>Tasks You have 1 new task.</p>	<p>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.</p>
 <p>Messages You have no new messages.</p>	<p>Messages: Send and receive messages from those supporting your Onefile portfolio here. You will also receive messages related to feedback and tasks.</p>
 <p>Witness Status Complete the witness status list.</p>	<p>Witness Status: This is where you will set up details of colleagues who witness evidence for your portfolio.</p>
 <p>Resources Access online resources uploaded by your centre.</p>	<p>Resources: Documents, videos and links to webpages that will support you in building your portfolio will be shared with you here.</p>

3 Assessment Team

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

Assessment Team



Jim Taylor
Primary Assessor

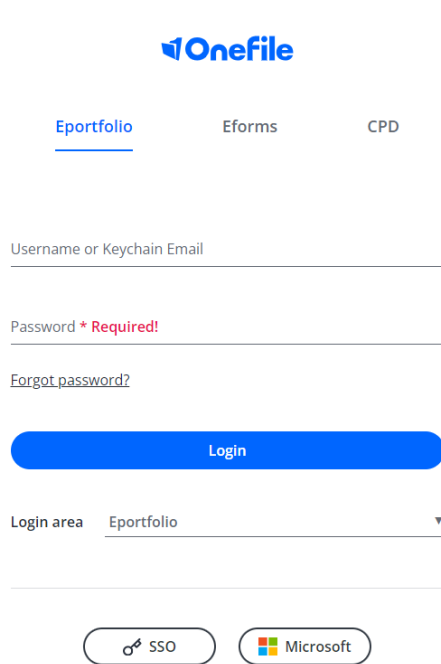
Offline

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



The login page features the Onefile logo at the top. Below it are three navigation tabs: 'Eportfolio' (selected), 'Eforms', and 'CPD'. The main form includes a 'Username or Keychain Email' field, a 'Password * Required!' field, and a 'Forgot password?' link. A prominent blue 'Login' button is centered. At the bottom, there is a 'Login area' dropdown menu currently set to 'Eportfolio', and two buttons for 'SSO' and 'Microsoft' authentication.

Log in at <https://login.OneFile.co.uk> and enter your **username** and **password**.

Your username will be the email address you registered with (usually a personal email address).

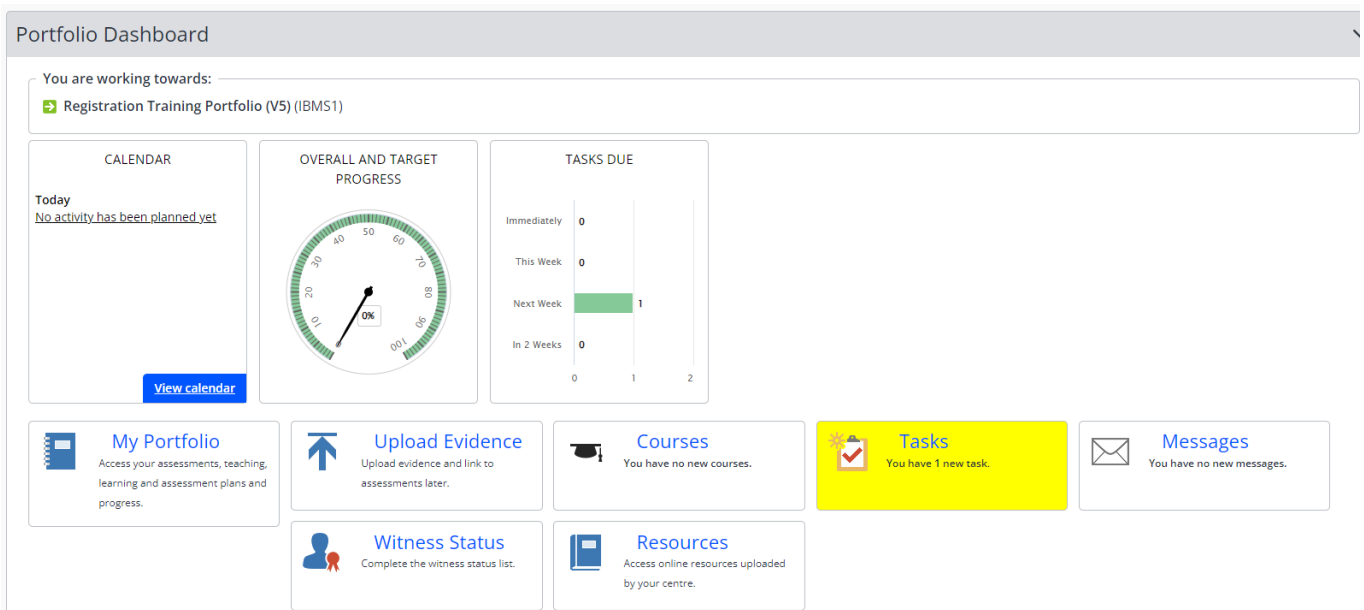
You will have been sent an initial email (please check SPAM/JUNK folders) and can then set your unique password.

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 correct candidate account to access your IBMS portfolio.

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 Portfolio Dashboard which was described in detail in section: 1.

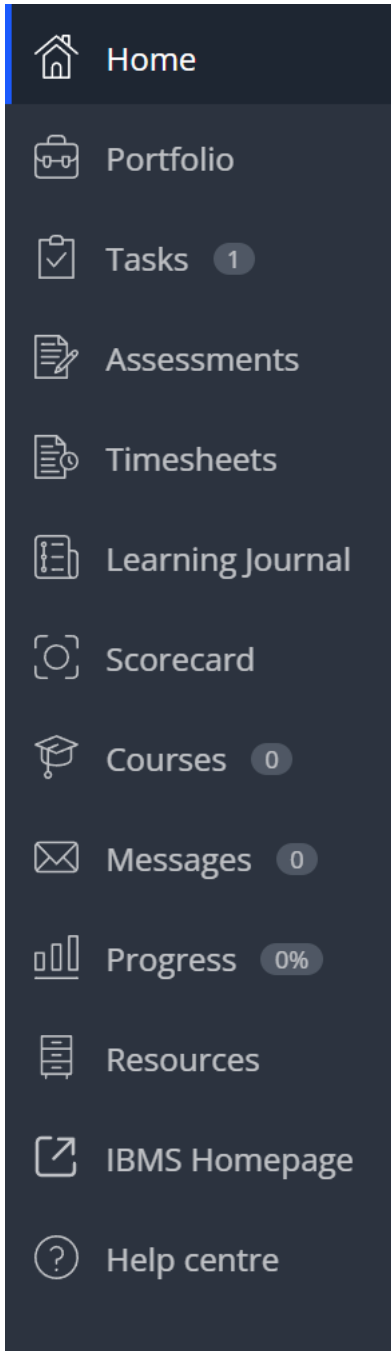


The Portfolio Dashboard provides a comprehensive overview of the user's progress. At the top, it identifies the current portfolio as 'Registration Training Portfolio (V5) (IBMS1)'. The dashboard is divided into several key sections:

- CALENDAR:** Shows 'Today' with the message 'No activity has been planned yet' and a 'View calendar' button.
- OVERALL AND TARGET PROGRESS:** A circular gauge showing 0% progress.
- TASKS DUE:** A bar chart showing 0 tasks due immediately, 0 this week, 1 next week, and 0 in 2 weeks.
- My Portfolio:** A button to access assessments, teaching, learning, and assessment plans and progress.
- Upload Evidence:** A button to upload evidence and link to assessments later.
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- Witness Status:** A button to complete the witness status list.
- Resources:** A button to access online resources uploaded by the centre.

5.2 Sidebar icons

Some of the sidebar icons are also on your Portfolio Dashboard page and were described in sections 1 and 2. The new icons you have access to are:



Home – this will take you to your portfolio dashboard and is the landing page after signing in.

Assessments – this will take you to any pending assessments and the area to create assessments.

Timesheets – this is where you can log any time spent on building your portfolio.

Learning Journal – this is where you can record activities not linked to an assessment.

Scorecard – the scorecard has not been developed for your portfolio

IBMS Homepage – link to IBMS website

Help Centre – this will give you access to the OneFile generic help pages.

6 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 and in the Task Icon



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

- Click into the task side menu bar or Task icon to access the task.
- You will see the message 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 message 'please update your profile information.'
- Upload a new profile picture. It is important that you set a picture of yourself to support 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.

6.1 My Details

- Enter your home address including your postcode where requested. This is a mandatory field. Do not select to display this on your public profile.
- Enter your workplace address.
- All other fields can be left blank.
- Check the time zone is correct for Dublin, Edinburgh, Lison. London

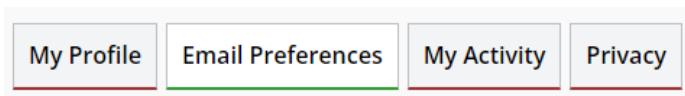
6.2 Attachments (CV, qualification certificates & other professional documents)

- Upload any certificates or other relevant qualifications. Useful documents for verification include copies of your degree transcript, a statement from your university confirming you are undertaking a placement year, or confirmation that you are completing an apprenticeship programme.

6.3 Candidate Details

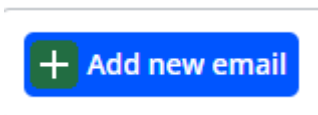
- If you would like to share some of your demographics with the IBMS please complete this section.
- When finished click **Save**.

6.4 Email Preferences



Click onto the tab at the top of the page for Email Preferences

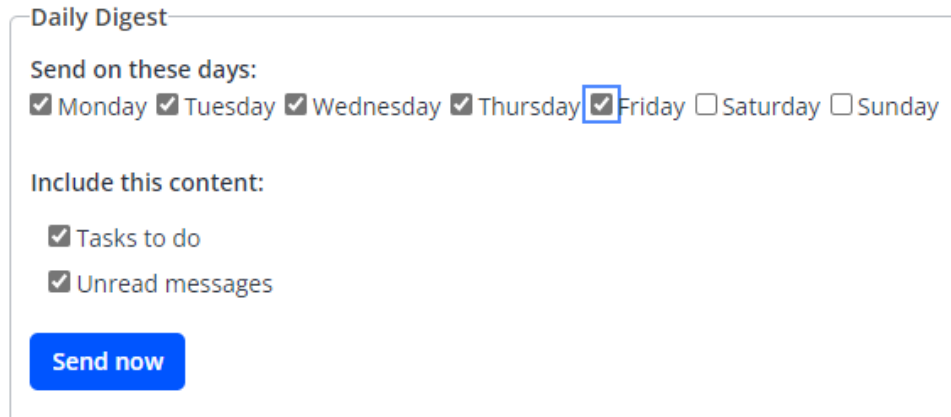
Your primary email address will be set as the email address your registered with and your Keychain email. This is usually a personal email address to enable you to continue access should you change workplaces.



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

6.5 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!

7 Setting up Witness details

Your Training Officer will be able to provide you with details of colleagues you are working with that are able to confirm evidence you are producing for your portfolio.

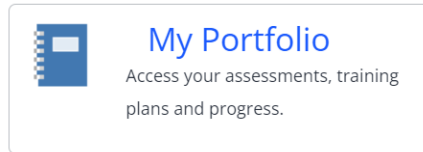
You can add these witness details at the start of your portfolio and also as you are going along. It is more efficient to add the key witnesses at the start of the portfolio so they are ready for selection later on.

- Speak with your training manager to obtain a list of witnesses that are suitable for you and the evidence you are collecting.
- Log into your portfolio
- Click on 'Portfolio' in the side bar menu or 'My Portfolio' from the Dashboard
- Click on the 'Manage' tab.
- Click on the Expert/Witnesses tab.
- Click 'Create new witness'.
- Select Witness
- Enter the details of the witness where prompted. Note: those with an * are mandatory fields
- In the 'relationship to candidate' field put the job title of the person who may be a witness
- Your Training Officer should be able to advise you on the status of your witness. If you are unable to access this information, select 'Occupational Expert and not familiar with the standards'
- Once you have completed all the details tick the candidate box to sign the Expert Witness details and click Save



8 My Portfolio

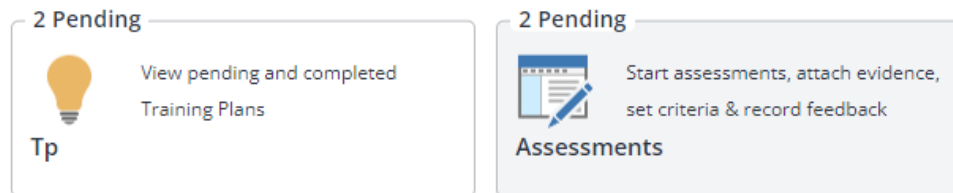
From the Portfolio dashboard on the Onefile homepage, click “My Portfolio”



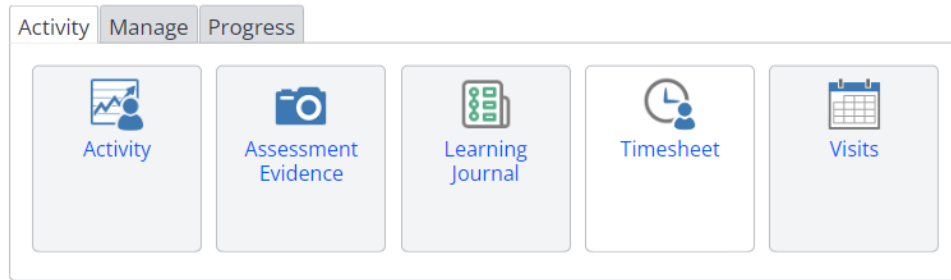
The two icons below will be the main icons you rely on during completion of your portfolio. These will allow you to access your training plans and your individual assessment tasks.

Overall Progress: 3%

Laboratory: Default Laboratory



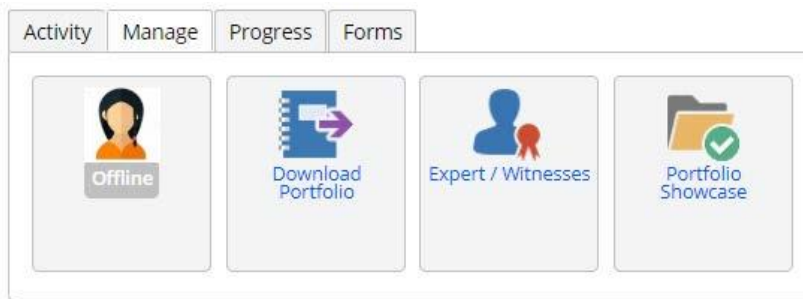
8.1 Activity tab



- **Activity** - this will display all activity on your portfolio.
- **Assessment evidence** (the camera icon) - this is where you can store evidence ready to upload at a later date.
- **Learning Journal** - where you can complete activity tasks. **These will not be routinely used in this programme.**
- **Timesheets** - where you can record time spent on activities.
- **Visits** - this will display any visits booked.

8.2 Manage tab

Next we have the **Manage** tab. This will display your profile picture. When you click the icon, it will take you to your profile.

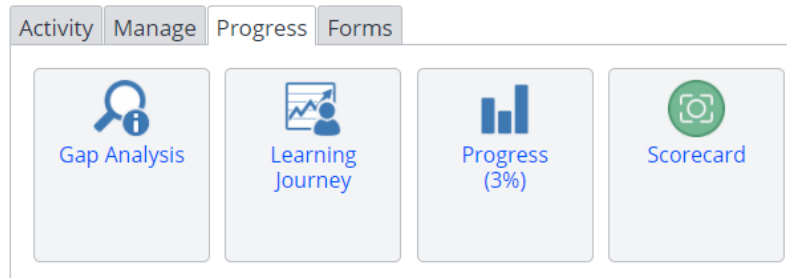


The next three icons are all enabled through the centre settings, so if you do not see these and think you need them, please speak with your trainer who can contact the IBMS.

- **Download portfolio** - you can request a download of your portfolio.
- **Expert / witnesses** - allows you to enter the details of an expert/witness.
- **Portfolio Showcase** - allows you to store your best work and download it as a zip folder. This is commonly used in some other types of qualifications.

Progress

Next, we have the **Progress** tab which will display:



- **Gap Analysis** - a breakdown of the units you are working towards and the supporting evidence for completed criteria.
- **Learning Journey** - this will display the assessments you've completed and your overall progress.
- **Progress** - this will display the progress for each module. If a module is at 100%, this will also display the users that have signed off the module summary. Please note this page can include 'Pending Assessments' so please check this when looking for accurate progress.
- **Scorecard** – the scorecard will be used for self-evaluation of your training and professional development. This feature is not currently available, but will likely be introduced later in your programme.

8.3 Forms

The **Forms** icon will show all the forms that have been assigned to you. You will be sent a notification task when there is a form for you to complete or review and you will be able to access the form from here. If you do not have a Forms tab you have no Forms assigned to you.

9 My Profile

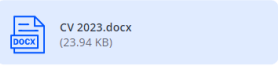
Your profile is where you will find details of your contact information, as well as links to any documents you have provided.

My Profile ▼

[Edit My Profile](#)

Place of Study/Work:	Study/Work Address:	Contact Telephone:	Contact Email:
Not provided	University Hospitals of Derby and Burton (UHDB) Uttoxeter Road Derby	Not provided	@nhs.net

CV & Other Documents:



10 Accepting a Training Plan

10.1 Tasks

When you receive a task to sign a training plan that has recently been sent to you by your trainer, you need to check the tasks and accept the plan to confirm you have understood what is required.

- Click into the Task title to open the Training Plan for signing.

16/09/2023 14:55	Please sign your recently prepared Training Plan by Training Manager
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- Read through the Training Plan requirements.

The due dates will appear on the right-hand side of each task. This will be the maximum time you have to complete this work. For some programmes this will be 3 years but you shouldn't leave everything to the last minute! Prioritise your work accordingly.

<p>Details of Planned Assessment Your tutor is going to carry out an observation on</p> <p>Please make sure you have..... The below points are going to be covered:</p> <p>1. Example 2. Example 3. Example</p> <p>Learning Outcomes [Unit 01 - 1 outcome, 4 criteria]</p> <p>Assessment Method: Observation Start by: Tutor Map Evidence: Holistically</p>	24/10/2019	07/11/2019
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10.2 Attachments

Your Training Plan may contain links or attachments as well. When reviewing your plan you can download any attachments in this area to your computer.

Learning Resources

Example Evidence of Achiev... .docx
(12.98 KB)

HCPC SoP.url
(0.00 KB)

ICO Anonymisation.url
(0.00 KB)

Learning Outcomes
[Section 1 - Module 1 - 2 outcomes, 3 criteria]

- Once you are ready to accept the plan, sign the declaration at the bottom of the page by checking the signed box and pressing the green **Accept** button.

11 Assessments

- Once the Training Plan has been accepted it will turn the contents of the assessments within each Training Plan into Tasks and the Task icon in the side menu bar will have a number next to it.
- You can view Assessments you should be working on in the Assessment tab in the left side menu.
- This will bring up a list of the Assessments and their reference. For example, S1: Module: 1 – Mandatory Evidence will be Section 1, Module 1 and the mandatory evidence you need to produce.
- You can use the drop-down menu titled 'Show:' to see Completed, Pending, Pending requiring your action and Future Planned assessments.
- You should work through the assessments as requested by your Trainer.

12 Providing Evidence for an Assessment (completing tasks)

- Log into your OneFile account
- Select 'Task' from the left-side menu.
- Click into the Task that you wish to start providing evidence for. **Note:** you can read the title and the first few lines of requirements in the task view.
- When the assessment opens you can view the instructions at the top of the page with any attachments. This will look similar to the example below.

Please complete your new assessment MERS: S1: Module 5: Professional Relationships – Mandatory Evidence 1

Task
Write a reflective account describing how your engagement with service users and colleagues has positively contributed to your professional development.

You may type into the evidence box provided or upload attachment(s), making sure your evidence covers the following HCPC Standards of Proficiency (SoP):
8.1, 8.12, 8.13

Guidance

- Candidates are expected to upload evidence that complies with the principles of information governance and standards of professional practice.
- The Candidate and Trainer are jointly responsible for ensuring that Onefile submissions do not contain identifiable patient information, redacting information where necessary to ensure it is not retained in files uploaded to OneFile.
- Candidates are reminded that work must be produced in accordance with the plagiarism declaration signed at the start of portfolio completion.
- Each piece of evidence is expected to include annotation by the trainer and show a process of discursive, constructive feedback.

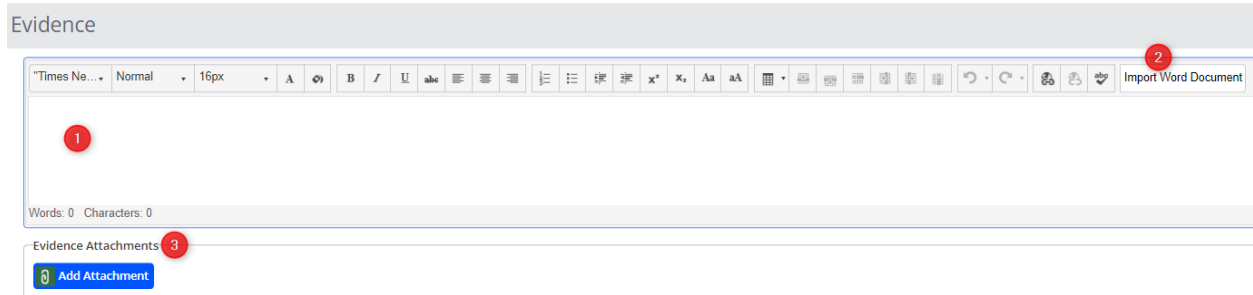
Resources
HCPC Standards of Proficiency – Biomedical Scientists 1st September 2023
Anonymisation: Managing data protection risk code of practice - ICO

- If your work is witnessed by a colleague you can select them from the drop down list in the Assessment Section of the evidence. See [here](#) on how to set up witnesses.

The screenshot shows the 'Assessment' section of the OneFile interface. It features a 'Details' section with several input fields: 'Primary Method' (Mandatory Evidence [REG]), 'Reference' (MER1), 'Expert Witness' (a dropdown menu), 'Date' (26/08/2023), and 'Title' (S1: Module: 1 - Mandatory Evidence). A red arrow points to the 'Expert Witness' dropdown menu, which is currently open, showing a list of names: 'New expert/witness', 'Prof. By-Jim, Created', 'Dr Officer, Training', and 'Miss Otomist, Phleb'.

Note: You can only select one witness per evidence. If your work was witnessed by more than one witness select the main witness from the drop down list and give details of the other witnesses in the free text Feedback & Comments section, for the Trainer.

- You can provide written evidence by typing directly into OneFile (1) or importing a Word document (2) or attaching a file(s) (3) from your uploaded evidence area or directly from your computer.



12.1.1 Save and keeping working on evidence

You can save and keep adding to your evidence.

To do this **do not sign** the evidence and press the **Save & Refresh** button.

12.1.2 To submit evidence

When you are happy with the evidence you have provided, scroll to the signatures box and tick the box next to your name before pressing **Save & Quit**. This will then send your evidence to your Trainer to review.

Declaration & Signatures

Only sign here when you have finished with this assessment and wish to send it to the next person.

Declaration	Name	Signed on Completion
I agree that the information provided here is an accurate account of what has taken place.	Gail Learner (Candidate)	<input checked="" type="checkbox"/>
I agree that the information provided here is an accurate account of what has taken place.	Trainer	<input type="checkbox"/>
I have sampled this evidence as part of my verification sample.	Internal Verifier	<input type="checkbox"/>
I have sampled this evidence as part of my verification sample.	Lead Internal Verifier	<input type="checkbox"/>
I have sampled this evidence as part of my verification sample.	External Verifier	<input type="checkbox"/>

Note: You may be working on multiple pieces of evidence at the same time.

13 Acknowledging Feedback

When tasks are completed, your Trainer will provide you with feedback and you will receive a task notification to acknowledge this (as shown in image below).

16/09/2023 15:44	Please acknowledge the Assessment feedback provided by Training Manager on MER5 for Gail Learner
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- Click into the title to open up the feedback.
- Scroll down to the Feedback & Comments section where you can read the feedback on your achieved work.
- Click the button to 'Mark as Read'
- This will provide acknowledgement that you have read the feedback on your achieved work.

Feedback & Comments

From: Training Manager (Trainer) on 16/09/2023 15:44 To: Gail Learner (Candidate) ✓ [✓ Mark as Read](#)

Thank you for submitting your work on time and in an approved format....

You can now leave this task and continue with your work.

13.1 Using the Messaging System in OneFile

OneFile contains an internal messaging system where you can communicate with anyone supporting you in OneFile.

13.1.1 To create a new message:

- Log into your OneFile account
- Select 'Messages' from the left side menu.
- Click 'New Message'
- Click 'To'. A list of potential recipients of a message from those supporting your OneFile portfolio will appear.
- Click on the name of the person you want to send a message to. This will move them into the To: column. Click 'Done' when finished.
- Enter a Subject Heading
- Enter your message or attach a document.
- When you are ready to send the message click 'Send'.

13.1.2 To respond to a message:

New messages received will appear in your left side menu bar as a number next to 'Messages'

- Log into your OneFile account
- Select 'Messages' from the left side menu
- Click into the Subject of the message to open it and read it.
- Some of these messages will be confirmations that your Trainer has provided feedback on an assessment you have submitted.
- To read feedback on assessments click into the hyperlink in the message and this will take you to the assessment the Trainer has provided feedback on. You can read this feedback on the assessment page in your portfolio.

Note: assessments that require additional work will appear as Tasks for you to complete any required actions.

14 Accessing plans not in the task list

If you have started work on a task and are saving the evidence to keep working on it the assessment will be removed from your task list.

To access work you have commenced, or no longer have a task notification for:

- From the side menu bar select 'Assessments'
- Select 'Pending requiring my action' from the filter at the top of the table of assessments
- Click into the title of the assessment you want to start or continue work on
- You can now work on the evidence as previously described.

15 Signing off a Module summary

When you have successfully achieved the mandatory and candidate choice evidence and covered all the assessment criteria for the Module your Trainer will receive a notification to sign off the Module.

Once they have completed this, you will receive a task notification to sign off the summary, as seen below.

30/08/2023 12:20	Please sign Section 1 - Module 1 Unit Summary to acknowledge the completion of this Unit
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- Click into the title of the task to open it up.
- Read the feedback given and sign off the module summary.
- Once this is completed you will see Candidate and Trainer appear in the green progress bar for this unit and your overall progress will increase.

16 Troubleshooting

I can't remember my password.

Go to the log in page for OneFile [OneFile Eportfolio Login](#) click the Forgot Password button

Username or Keychain Email

Password * **Required!**

[Forgot password?](#)

You will be asked to submit the email address of the account holder, usually a personal email address. And a reset link will be sent to you.

Check SPAM/JUNK folders for this email.

I have submitted work to my Trainer that I didn't want to

You will need to contact your Trainer with details of the incorrectly submitted evidence and request they return it to you.