

Tips to help you complete your learning portfolio

1. Check with your departmental portfolio (Pf) administrator that you have a Scorion account and you are linked with your supervisors.
2. Make sure you are using the correct URL for the e-Pf.
3. After you sign in, you need to create a form set for the current study year.
4. Populate this form set with empty forms by inserting various assessment forms.
5. There will be two Clinical Competency Committee (CCC) forms already in your form set. These replace the previous PAT form. As part of the local CCC, your local HOD and program manager will complete these 6-monthly.
6. Whenever you have filled in a form, you need to invite a supervisor to review and validate your learning activity. You do this by adding a reviewer or typing in an email of a supervisor. Then click "Send overview" and a pre-populated email request will appear. Please do so immediately after each activity.
7. You can link up to 4 supervisors to your portfolio. However, you can send a form to any supervisor or person by typing in their email address and inviting them to assess you. This may involve supervisors from outside of FM i.e. O&G, Paeds, Surgery, Anaesthetics etc.
8. Your portfolio belongs to you and can only be accessed by the supervisors and program director you gave access to.
9. Your departmental administrator/secretary or program director responsible for the IT management of the portfolios would have set up the registrar-supervisor groups. Inquire from them if you are battling with this. They, in turn, have access to the secretary at the SA Academy of Family Physicians for higher-level access.
10. You can insert up to 4 "allocations" for an academic year. It is strongly advised that you carefully plan your year and decide to bundle your learning into 2-4 allocations/year.
11. For every allocation, you need to complete a Learning Plan, and at the end of the allocation, you also need to fill in a Registrar Reflection form and invite your family physician supervisor linked to your Pf to fill in a Periodic Assessment form.
12. If you have been working in a clinical area away from your family physician supervisor, then that clinical specialist should liaise with your family physician supervisor and could also fill in the Periodic Assessment form.
13. The minimum for an academic year is 2 bundles each of a learning plan, reflection, periodic assessment. As long as there are no gaps, your learning plans should be back to back.
14. When you write your learning plan, it's best to first discuss with your supervisor to get a clear idea of expectations for yourself, your supervisor, the MMed program, and your local clinical environment and team. Keep the national entrustable professional activities (EPAs) and national programmatic outcomes in mind. For your MMed program, scan where the structured teaching and learning segments (modules/course, etc.) are scheduled that cover

aspects of your learning plan and the outcomes. Also, consider your leave and your research thesis work.

15. Once you have filled in a learning plan and sent it to your supervisor for validation, your supervisor should give feedback and then validate the form. You will be able to view the feedback in your learning plan under the "Closed" tab.
16. If you want to update your learning plan, after you read the feedback, and want to make changes, you can insert a new learning plan form, and click the "copy from previous form" function and select the previous learning plan in the drop-down menu. This will recreate your previous learning plan without the supervisor's feedback.
17. No minimum number (norm) of assessment forms must be completed for every academic year anymore. This is because of the shift away from ticking numbers and giving scores towards making entrustment decisions and giving feedback on as many learning points as possible that you added to your portfolio. These are spread over the year and structured around the national EPAs.
18. The various forms include Observations (DOPS, mini-CEX, One-minute preceptor for 1-1 teaching, Group Teaching, C-sections, Anaesthetics, Communication Skills Observation Tool), Educational meetings, Entrustment-based Discussions, Assignments, Logbook skills, and Certificates of other learning/training/community events.
19. Your supervisor can use a "Push Feedback" function to fill in a form without your invitation. This applies to Observations, Educational meetings and Entrustment-based Discussions in your portfolio. Otherwise, your supervisors depend on you sending them a form for every learning review opportunity.
20. For the DOPS forms, which you complete for procedures done, it is important that you are observed and receive feedback on a variety of procedures and levels of complexity over the year. The same goes for the mini-CEX forms, which capture learning during your consultations in various clinical settings with different supervisors.
21. The two types of forms for capturing your teaching skills include a 'Teaching Assessment Tool' for group teaching and a 'One minute preceptor' for one-on-one teaching.
22. All forms, including the logbook forms, are clustered around the EPAs and contain the procedural and other skills agreed upon nationally that are expected from a competent family physician. Since you are working as a registrar in a district hospital-type environment, even if you do not formally 'rotate' through a specific clinical discipline, you should be working and learning across clinical areas, e.g. general wards, the emergency centre, PHC clinics, and the community. Therefore, you need to be observed by and receive feedback from your supervisors on sets of skills, as they pertain to a clinical workspace, typically described in an EPA. Be honest and realistic in the assessments. Even if you cannot perform a certain skill at a certain point in time, as you grow within a year or over the years, your entrustment for various skills should increase.

23. At least once a year, you need to fill in the Multisource Feedback (MSF) form, which is already inserted in your form set. This is best done in the second half of your academic year. Invite by e-mail 10-20 colleagues, some more senior than yourself, and some 'below your level', who work with you and have seen you in practice, to fill in the form. The completion is anonymous. You should get valuable feedback from them.
24. Some 'forms' that support learning include case-based discussions, chart-stimulated recall, clinical question analysis, and significant event analysis.
25. The CCC form is not for you or your supervisor to complete. You invite the program director/HOD to complete this in the middle and/or at the end of the academic year.
26. All the forms have the option to attach files to them. These can be useful as evidence of learning for yourself and your supervisors.
27. You can check your progress over the year by going to your Dashboard and clicking on the headings to scroll through the various areas in your portfolio. You will see a complete overview, including all the feedback from the MSF assessment.
28. While completing the various forms, you will notice that you are expected to grow in all the EPAs for Family Medicine. The entrustment scales are from 1 (observe only) through 2,3,4 (decreasing need for observed supervision), to 5 (work without supervision).
29. Your portfolio also has a space to insert Certificates from other learning opportunities.
30. Several useful resources can be accessed by going to your 'File manager' --> 'My shared folders' --> 'Information documentation'.
31. If you have empty or incorrect forms that you need to delete, the department administrator for the portfolio IT can remove them, but only if they have not yet been validated.
32. Your portfolio is downloadable as a pdf, and can be kept, for future reference.
33. Increasingly, the portfolio will become a part of the FCFP exams as evidence of your entrustable professional activities.
34. When you apply to take the national FCFP(SA) exams at the end of your 3rd year as a registrar, you will need to send the local (departmental) CCC forms for year 1,2 and 3, and the link to your full portfolio for year 3, to the CMSA. If you completed a paper portfolio, you will have to upload a pdf file of your year 3 portfolio. The national CCC will finalise whether your learning and work-based assessments over 3 years were satisfactory for taking the national exit exam.

Compiled and updated by Proffs L Jenkins and M Naidoo, 29 December 2023