

## Horus ePortfolio

### Foundation Supervisors - Guidance on creating meeting forms

1) Once you are logged in to Horus - click on the **'Supervising'** Tab from the top menu bar to reveal your assigned Foundation Doctor(s)

*N.B. If you don't see your foundation doctor's name in the list, you have not been assigned > ask your local Trust e-portfolio/postgraduate administrator to assign you.*

Next click on **'Open'** on the right of your Foundation doctor's name to open their ePortfolio. See Screen shot below

This is the test version of Horus ePortfolio, you can find the live version here.

### Horus ePortfolio

Health Education England

Home Admin menu **Supervising** Forms (start new) Help A.Burton Log out

#### Supervising

Foundation Doctors under your supervision (most recent first).

Start typing to filter the results in the table:

Foundation Doctor	Supervision Details	Portfolio
Uma Veen	Educational supervisor: 04-Apr-2018 until 31-Jul-2018 Clinical supervisor: 04-Apr-2018 until 31-Jul-2018 Educational supervisor: 06-Dec-2017 until 03-Apr-2018 Clinical supervisor: 06-Dec-2017 until 03-Apr-2018 Clinical supervisor: 03-Aug-2017 until 06-Dec-2017 Educational supervisor: 02-Aug-2017 until 05-Dec-2017	<b>Open</b>
<b>Melanie Morrison</b>	Educational supervisor: 04-Apr-2018 until 31-Jul-2018 Clinical supervisor: 04-Apr-2018 until 31-Jul-2018 Educational supervisor: 06-Dec-2017 until 03-Apr-2018 Clinical supervisor: 06-Dec-2017 until 03-Apr-2018 Educational supervisor: 02-Aug-2017 until 05-Dec-2017 Clinical supervisor: 02-Aug-2017 until 05-Dec-2017	<b>Open</b>
Benjamin Arnold	Educational supervisor: 03-Aug-2017 until 06-Dec-2017	<b>Open</b>
Alexander Murray	Clinical supervisor: 03-Aug-2017 until 06-Dec-2017	<b>Open</b>
Donna Dowd	Educational supervisor: 07-Dec-2016 until 04-Apr-2017	<b>Open</b>
Jasmine Bailey	Clinical supervisor: 03-Aug-2016 until 06-Dec-2016	<b>Open</b>

Showing 1 to 6 of 6 entries Previous 1 Next

#### New forms quick start

- [Clinical Supervisors Report](#)
- [Educational Supervisors Report](#)
- [Educational Supervisors end of year report](#)

#### Placement Supervision Group

- [Manage / start PSG feedback](#)

2) Next you will see the **'Portfolio contents'** page with a list of meeting forms / SLE forms or it may be blank if no forms are completed yet. See below

### Horus ePortfolio

Health Education England

Home Admin menu **Supervising** Forms (start new) Help A.Burton Log out

#### Melanie Morrison, F1

F1: Melanie Morrison (2017-18) ▾

#### Portfolio contents

Placement: 02-Aug-2017 - 05-Dec-2017

Initial Meeting with Educational Supervisor	08-Aug-2017 use as evidence
Mini-Clinical Evaluation Exercise	08-Aug-2017 use as evidence

#### Filter contents by type

Structured meetings and reviews

- [Initial Meeting with Education... \(1\)](#)

Supervised Learning Event

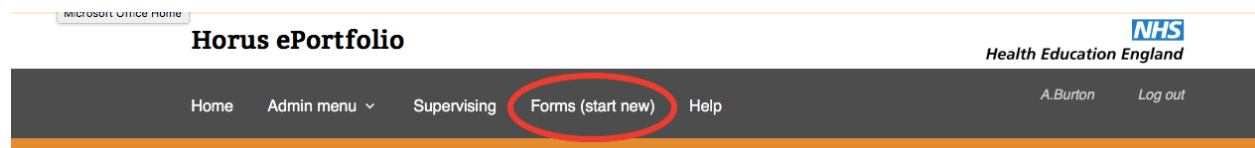
- [Mini-Clinical Evaluation Exerc... \(1\)](#)

[Show all](#)

# Horus ePortfolio

## Foundation Supervisors - Guidance on creating meeting forms

3) To create an **initial/induction** meeting form - Click on **'Forms (start new)'** located on the grey menu bar at the top. Then click on the appropriate form see below



### Create New Forms

Please refer to the [Programme timetable](#) for further guidance on which forms need to be completed when and by who.

#### Mandatory forms for each placement

##### At the beginning of each placement

Form	Who	Min.	Help
<a href="#">Initial Meeting</a>	ES	1	<a href="#">help</a>
<a href="#">Induction Meeting</a>	CS	1	<a href="#">help</a>
<a href="#">or Combined Initial and Induction</a>	ES	1 *	<a href="#">help</a>

##### Throughout each placement

Form	Who	Min.	Help
<a href="#">Mini-Clinical Evaluation Exercise (Mini-CEX)</a>	SLE	3	<a href="#">help</a>
<a href="#">Direct observation of procedural skill (DOPS)</a>	SLE	0	<a href="#">help</a>
<a href="#">Case-based discussion (CBD)</a>	SLE	2	<a href="#">help</a>
<a href="#">Reflection</a>	T	2 †	-
<a href="#">PDP</a>	-	-	-

##### At the end of each placement

Form	Who	Min.	Help
<a href="#">Clinical Supervisors Report</a>	CS	1	<a href="#">help</a>
<a href="#">Educational Supervisors Report</a>	ES	1 ^	<a href="#">help</a>

\* Use this if your Educational Supervisor is also your Clinical Supervisor for your first placement

† Local rules may apply, please check with your local FPA (Foundation Programme Administrator)

^ An educational supervisor's end of placement report is not required for the last placement of F1/F2; the educational supervisor's end of year report replaces this.

#### N.B

- *Initial Meeting created by Educational Supervisor (ES)*
- *Induction Meeting created by Clinical Supervisor (CS)*
- *Combined Induction Meeting with CS & Initial Meeting with ES created if the ES has the dual role for a 4month placement*

4) A blank meeting form appears - the content should look familiar to you as it is core FP curriculum content. It is just the interface and functionality that has changed with the new Horus ePortfolio see below

The screenshot shows the 'Initial Meeting with Educational Supervisor' form. It includes fields for Date of meeting, Name of Foundation Doctor, Placement, Supervisor's Role (Educational supervisor only or Joint educational and clinical supervisor), a question about agreeing a personal development plan (PDP), and a text area for comments. There are buttons for 'Close form (without saving)', 'Save (and review before submission)', and 'Save (and leave as draft)'.

## Horus ePortfolio

### Foundation Supervisors - Guidance on creating meeting forms

5) First record the '**Date of meeting**' using the calendar pop-up that appears when you put your cursor in the '**Date of meeting**' box see below

The screenshot shows the top navigation bar with links: Home, Admin menu, Supervising, Forms (start new), Help, A.Burton, and Log out. The form title is "Initial Meeting with Educational Supervisor" with a "Close form (without saving)" button. The "Date of meeting: \*" field contains "p.m. 01-Jan-2000". A red arrow points to this field, and another red arrow points to the calendar pop-up that appears. The calendar is for August 2017, with the 9th highlighted in yellow. Below the calendar, the "Supervisor's Role: \*" section has two radio buttons: "Educational supervisor only" and "Joint educational and clinical supervisor - please complete the 'Combined Initial and Induction Meeting' form instead". A text box asks: "It is important that the educational supervisor and the foundation doctor agree a personal development plan (PDP) as part of their initial meeting. Have you agreed a personal development plan for this placement?: \*". Below this are "Yes" and "No" radio buttons. A text area for "Please record any comments or notes as discussed and agreed during the meeting:" is at the bottom. At the very bottom are two buttons: "Save (and review before submission)" and "Save (and leave as draft)".

6) Next start typing in the '**Name of foundation doctor**' box, the first three or four letters of their first or last name should be enough to instigate Horus to search your list of supervised foundation doctors - the names that match what you have typed will appear in a drop-down box see below

This screenshot shows the same form as above, but the "Date of meeting" is now "09-Aug-2017". The "Name of Foundation Doctor: \*" field contains "mel". A red arrow points to this field, and another red arrow points to the drop-down list that appears, which shows "Morrison, Melanie (2000082)". Below this, the "Placement: \*" section has the text "Please select a Foundation Doctor." The "Supervisor's Role: \*" section and the PDP agreement section are identical to the previous screenshot. The "Please record any comments or notes as discussed and agreed during the meeting:" text area is also present. At the bottom are the same two buttons: "Save (and review before submission)" and "Save (and leave as draft)".

## Horus ePortfolio

### Foundation Supervisors - Guidance on creating meeting forms

7) Select the relevant foundation doctor's name from the list then one or more placement options will become available on the form. See below screen shot.

7(a) Select (click on the radial button) the placement for which you have held your initial/induction meeting. If you are completing this form at the end of a placement for the upcoming placement, you will see both placements - check that you are selecting the correct placement.

*N.B. You can create a form up to 1 month before the start of a placement and up to 3 months after the end of a placement.*

7(b) Next click on the radial buttons to select supervisor role and agree a PDP. If you click 'No' a PDP has not been agreed then another box will appear to ask when you will agree one and an option to create one following the meeting will appear.

7(c) Complete the rest of the form and click either 'Save (and review before submission)' or 'Save as draft' see below

**Initial Meeting with Educational Supervisor** Close form (without saving)

Date of meeting: \*  
09-Aug-2017

Name of Foundation Doctor: \* ⓘ  
Morrison, Melanie (200C)

Placement: \*  
F1: 02-Aug-2017 - 05-Dec-2017 (Geriatric Medicine at University Hospitals of Leicester NHS Trust)

Supervisor's Role: \*  
☒ Educational supervisor only  
☐ Joint educational and clinical supervisor - please complete the "Combined Initial and Induction Meeting" form instead

It is important that the educational supervisor and the foundation doctor agree a personal development plan (PDP) as part of their initial meeting. Have you agreed a personal development plan for this placement?: \*  
☐ Yes  
☒ No

When will the PDP be agreed?: \*  
e.g. 01-Jan-2000

Do you want to generate a PDP following completion of this meeting form?: \*  
☐ Yes  
☐ No

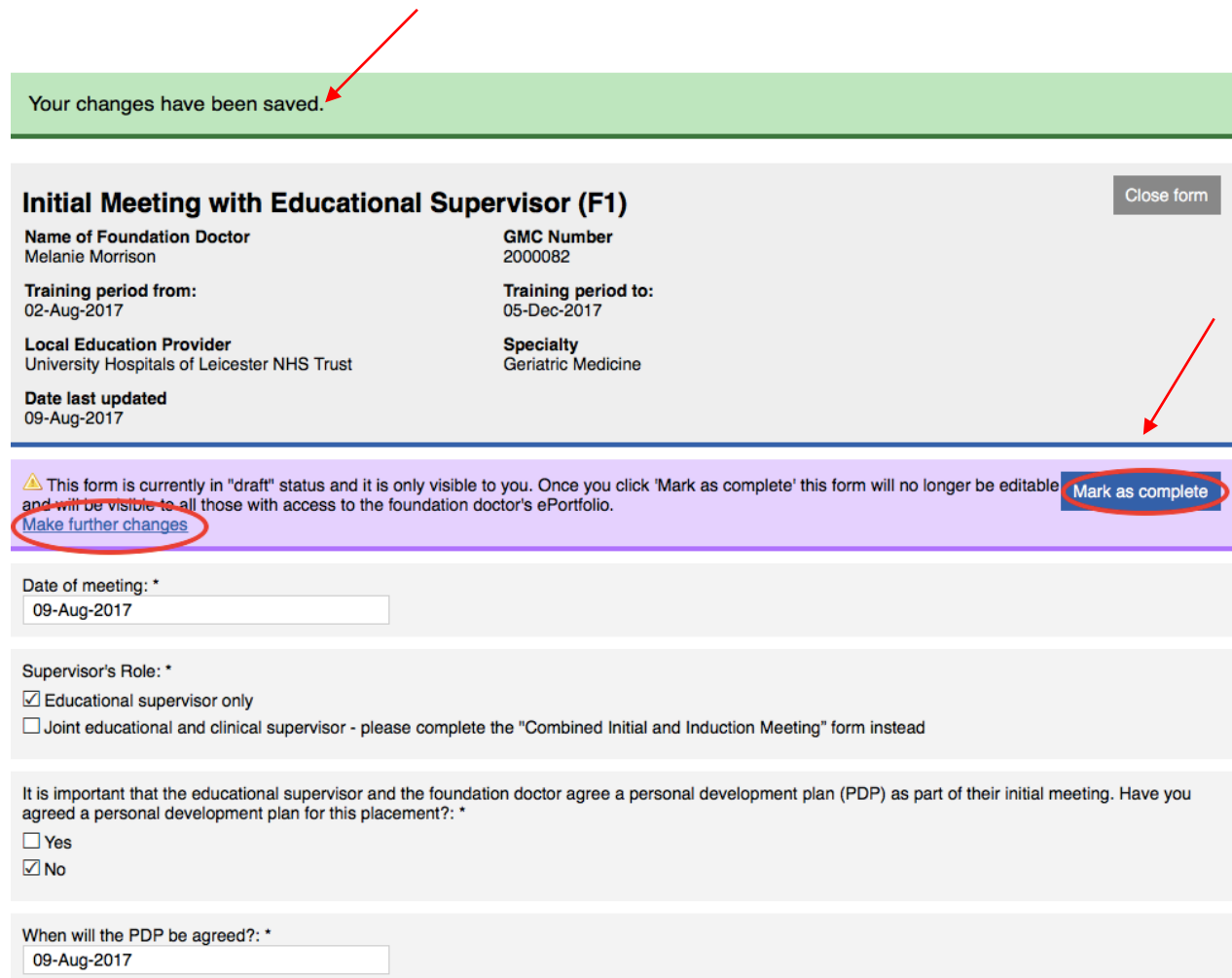
Please record any comments or notes as discussed and agreed during the meeting:  
TEST

**Save (and review before submission)** **Save (and leave as draft)**

## Horus ePortfolio

### Foundation Supervisors - Guidance on creating meeting forms

8) If you select '**Save (and review before submission)**' The next screen - you will see in the green bar at the top of the page that your changes have been saved. You can review your form by scrolling down to view all the content. if you are happy with the accuracy you then scroll back up to the top of the form and select '**Mark as complete**' in the purple bar on the right. See below



Your changes have been saved.

### Initial Meeting with Educational Supervisor (F1)

**Name of Foundation Doctor**  
Melanie Morrison

**GMC Number**  
2000082

**Training period from:**  
02-Aug-2017

**Training period to:**  
05-Dec-2017

**Local Education Provider**  
University Hospitals of Leicester NHS Trust

**Specialty**  
Geriatric Medicine

**Date last updated**  
09-Aug-2017

⚠ This form is currently in "draft" status and it is only visible to you. Once you click 'Mark as complete' this form will no longer be editable and will be visible to all those with access to the foundation doctor's ePortfolio.

[Make further changes](#) **Mark as complete**

**Date of meeting: \***  
09-Aug-2017

**Supervisor's Role: \***  
☒ Educational supervisor only  
☐ Joint educational and clinical supervisor - please complete the "Combined Initial and Induction Meeting" form instead

It is important that the educational supervisor and the foundation doctor agree a personal development plan (PDP) as part of their initial meeting. Have you agreed a personal development plan for this placement?: \*

☐ Yes  
☒ No

**When will the PDP be agreed?: \***  
09-Aug-2017

9) If you want to make further changes then select '**Make further changes**' in the purple information bar (seen on the **above** screen shot)  
The meeting form will open up again and you can edit then again select '**Save (and review before submission)**'

*N.B. See pages 6 & 7 for continued instruction.*

## Horus ePortfolio

### Foundation Supervisors - Guidance on creating meeting forms

10) Then select '**Mark as complete**' again in the purple bar. Next a pop up will appear asking you to confirm '**Mark the form as complete**' see below

The screenshot shows the 'Initial Meeting with Educational Supervisor (F1)' form. At the top, a green bar states 'Your changes have been saved.' Below this, the form contains fields for 'Name of Foundation Doctor' (Melanie Morrison), 'GMC Number' (2000082), 'Training period from:' (02-Aug-2017), 'Training period to:' (05-Dec-2017), 'Local Education Provider' (University Hospitals of Leicester NHS Trust), and 'Date last updated' (09-Aug-2017). A yellow warning icon indicates the form is in 'draft' status. A modal pop-up is centered on the screen with the text: 'Are you sure you wish to complete this form? Once completed you won't be able to make further changes.' It has two buttons: 'Mark the form Complete' (highlighted with a red circle) and 'Cancel'. The background form is dimmed.

11) The form will now be saved and submitted and no longer editable. It will now be available for your foundation doctor to view and sign. see below **green bar** confirming form submitted and **purple bar** '**Awaiting signature from Foundation Doctor.**' Now click on the grey box '**Close form**' see below

The screenshot shows the same 'Initial Meeting with Educational Supervisor (F1)' form, but now it is no longer in draft status. A green bar at the top states: 'This form has been marked complete. It's now available to the Foundation Doctor.' Below this, a purple bar states: 'Awaiting signature from Foundation Doctor. This form will only be complete once the Foundation Doctor has also signed the form.' A red arrow points to the 'Close form' button in the top right corner. The form fields remain the same as in the previous screenshot.

# Horus ePortfolio

## Foundation Supervisors - Guidance on creating meeting forms

12) Next you will see your foundation doctor's portfolio content page with your meeting form and a yellow triangle to denote not signed yet by the foundation doctor. See below

This is the test version of Horus ePortfolio, you can find the [live version here](#).

### Horus ePortfolio

Health Education England

Home Admin menu ▾ Supervising Forms (start new) Help


A.Burton Log out

### Melanie Morrison, F1

F1: Melanie Morrison (2017-18) ▾

#### Portfolio contents

Placement: 02-Aug-2017 - 05-Dec-2017

Initial Meeting with Educational Supervisor	08-Aug-2017 <a href="#">use as evidence</a>
Mini-Clinical Evaluation Exercise	08-Aug-2017 <a href="#">use as evidence</a>
Initial Meeting with Educational Supervisor	 09-Aug-2017 <a href="#">use as evidence</a>

#### Filter contents by type

**Structured meetings and reviews**

[Initial Meeting with Education...](#) (2)

**Supervised Learning Event**

[Mini-Clinical Evaluation Exerc...](#) (1)

[Show all](#)

### Acknowledgements

I would like to thank HEE Horus Foundation ePortfolio Team for the use of screen shots in this guidance document, from the Horus training site.



This work is licensed under a [Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License](#).