ePortfolio
User Guide

A guide for practitioners

Contents

Let's Get Started!

- You should use this ePortfolio User Guide and the *ePortfolio Handbook* in conjunction with the OTBNZ website. Ensure you read all the recommended competence documentation carefully.[1]

- Start by using your login to open myOTNBZ Home page and locate the ePortfolio tab on the far right (*See Figure 1*).

- Ensure your system allows pop-ups because they are essential to the operation of the system.

- Click the ePortfolio tab.

- Your ePortfolio will open in a new tab.

- Note that if you are newly registered, or have recently changed your password, or have entered new information into your myOTBNZ account, it will take at least 24 hours for your ePortfolio to be enabled.

- A video tutorial is available to help navigate around ePortfolio. You can access the tutorial from the ePortfolio Home page (see 'Video Tutorial' under 'Tools' in the left-hand side bar).

Figure 1: myOTBNZ Home page

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[1] All competence documentation is listed in the Handbook and on our website.

Sections of ePortfolio

The ePortfolio is broken down into a number of pages. These pages can be seen across the top of the screen in a green band and in the Tools sidebar on the left-hand side of the screen. For ease of use, these two information sections will appear on all screens as you navigate through your ePortfolio.
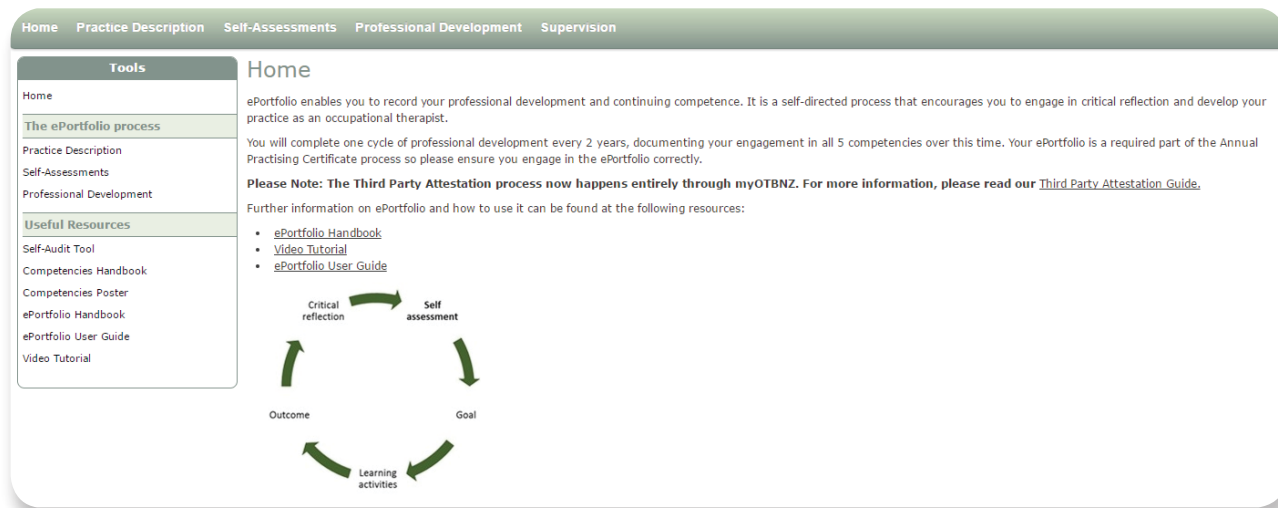
You have across the top:

- Home
- Practice Description
- Self-Assessments
- Professional Development
- Supervision.

Useful resources on the side bar include:

- Self-Audit Tool
- Competencies Handbook
- Competencies Poster
- ePortfolio Handbook
- ePortfolio User Guide
- Video Tutorial.

Home

The Home screen is the first screen that appears when you log on to the system (*See Figure 2*). There are no active tasks on the Home page. It is simply a welcome screen and a location for links to useful tools. The example of a cycle of reflective practice is given to keep in mind as you work through the ePortfolio. Further information relating to reflective practice is contained in your *ePortfolio Handbook*.

Figure 2: ePortfolio Home page

Practice Description

- It is very important that personal information is kept up to date as the OTBNZ is expected to know the place of work and how to contact all occupational therapists who hold an annual practising certificate.

- Workplace information is updated from the 'Employment' tab of your myOTBNZ account and can be updated by you at any time.

- Personal and Workplace information comes into ePortfolio from your myOTBNZ account. While myOTBNZ updates immediately, allow at least 24 hours for this data to be transferred to ePortfolio (*See Figure 3*).

- Qualification data can only be added by the OTBNZ. Your primary qualification was added at the time of registration. If you wish to add a new qualification, you must send in a certified hard copy of the (new) qualification certificate to OTBNZ for further consideration. If accepted, OTBNZ will add the new details. Note that only formal qualifications provided by educational institutions will be considered.

Figure 3: Practice Description

Self-Audit Tool

The Self-Audit Tool is an optional tool available within your ePortfolio. You will find the link to it in the left-hand side Tools bar. It is not compulsory, but it is recommended. You can work through the tool prior to completing your self-assessment. The tool is there to help you identify areas you need/wish to improve upon.

Ensure you select the correct cycle before you enter your data. Each self-audit you complete can be saved to the system and reviewed by you later (*See Figure 4*).

To begin a self-audit, select your cycle and then click the blue 'Add Self-Audit' button. Once you click this button a new page appears with six tabs running across the screen. Each Competency has its own tab, and there is also a final 'Summary' tab. The 'Summary' tab contains a list of all the Competencies and their abilities and actions. Abilities and actions are described in detail in *Competencies for Registration and Continuing Practice*.

For each Competency and its listed actions, select one of two options:

▼ I need to address areas for development, or
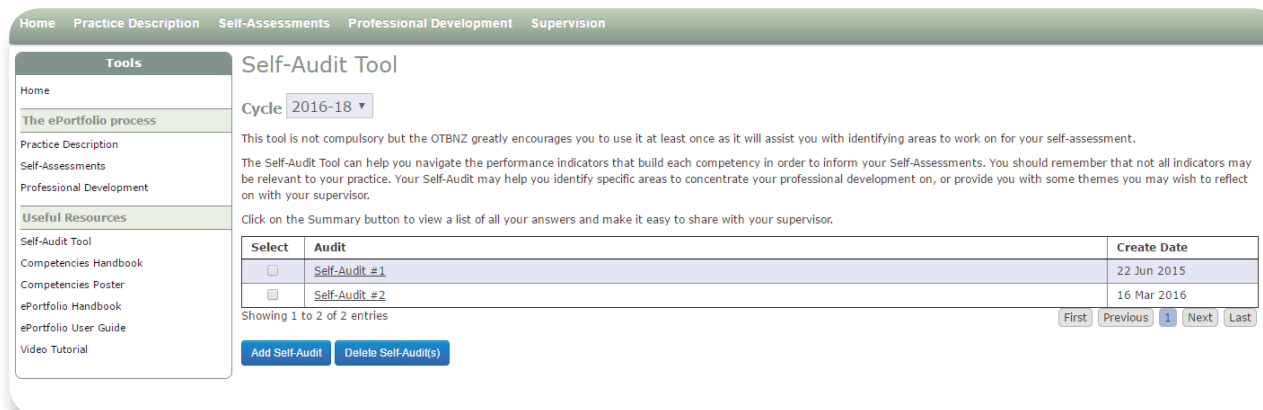
▼ I wish to advance my understanding.

Also, write any comments you wish to reflect upon. Remember: you are reflecting on your own practice, so use this as a sounding board. There is no right or wrong way to complete the self-audit.

You can complete as much or as little of the self-audit as you wish. For example, you may only wish to reflect on Competency 3, or you may wish to only look at a selection of the actions of each Competency and not all of them. We recommend you have a copy of the Competencies close to hand for easy review.

Once you have completed the areas of a Competency you have decided on, ensure you scroll to the bottom and click 'Save'. You will need to do this for all five Competencies separately. You cannot switch between tabs without losing your data.

If you are having trouble with assessing your own competence, the OTBNZ recommends you print a copy of your answers and share it with your supervisor. It is part of your supervisor's role to assist you to complete your ePortfolio appropriately for your level of experience, skills and practice setting.

Figure 4: Self-Audit

Self-Assessments

The Self-Assessment is your overview of how you think you are performing within the five Competencies. We recommend you complete a self-audit before you begin this task because it will help you to identify the areas you wish or need to work on. There should be a self-assessment entered for every Competency at all times (*See Figure 5*).

The Self-Assessment is a free-text box where you can write as much or as little as you like. We recommend that you read the Handbook, especially the section regarding the Self-Assessment and the Audit Standards, so you are fully informed about the OTBNZ's expectations. Above the free-text box are two drop-down options designed to help you complete your self-assessment:

▼ Guiding Questions: these questions prompt you to ask questions about yourself and your practice. They do not have to be answered: they are simply a guide to assist you.

▼ Performance Indicators: these are the individual actions and abilities the OTBNZ expects all occupational therapists to demonstrate in their practice. For further detail, see *Competencies for Registration and Continuing Practice* and the *ePortfolio Handbook*.
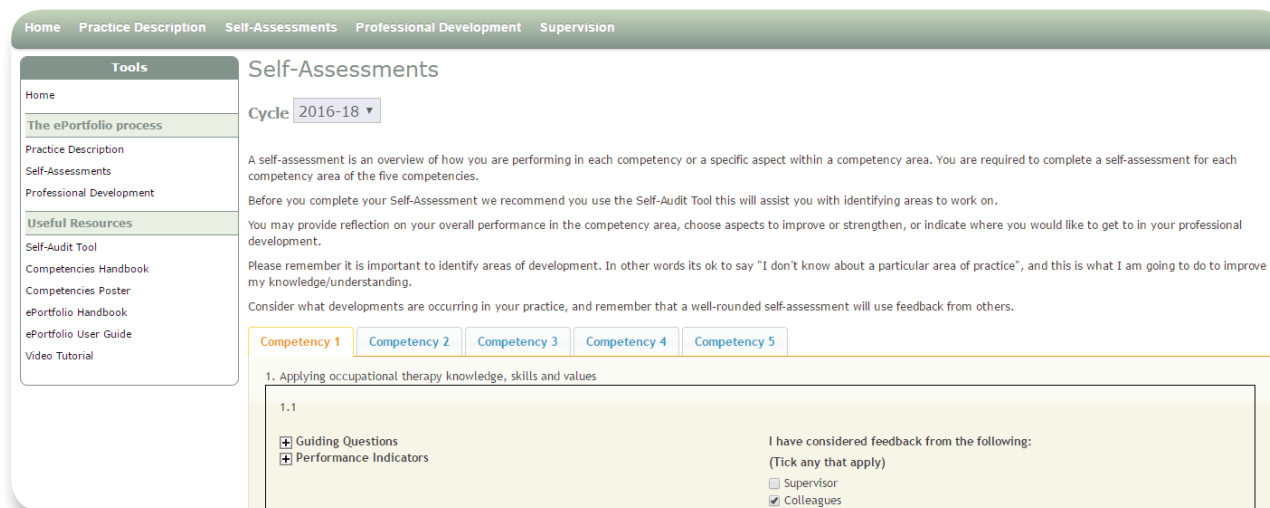
Ensure you upload documentation you feel is pertinent to your assessment. Remember: the OTBNZ is looking for evidence of engagement in the ePortfolio and an awareness of the need to remain competent in each Competency area.

The five Competencies are entered separately in five separate tabs across the page. Ensure you save each tab's work before you move on to the next tab.

You can create additional self-assessments. This may be useful if you are moving from one area of practice to another, or you feel your current self-assessment is no longer relevant to your current situation. To add a self-assessment, click the 'Add Self-Assessment' button at the bottom of the page. You also need to tick the boxes to indicate how you have gathered feedback about your practice. To meet audit standards there must be evidence of feedback from supervision in the ePortfolio.

Once completed, you can download your work. This gives you a digital or hard copy of your own to use as you like. The button for this function is at the bottom of each Competency page, next to 'Save' and 'Cancel'.

Figure 5: Self-Assessments

Professional Development

In this section you will be drawing from the information you provided in your self-assessment. Ensure you read the information at the top of the page very carefully because it explains the relationship between the different tasks that need to be completed in your plan.

The Competencies are set out in the same way as the Self-Assessment page.

Any comments you made in your self-assessment will appear above the Goal section for ease of review. They will correlate with each Competency.

Goal

When entering your goal you can choose from five dropdowns:

- ▼ To keep current with
- ▼ To learn more about
- ▼ To acquire knowledge of
- ▼ To further knowledge of
- ▼ Write my own goal

If you select one of the first four options, write a simple phrase in the empty box beside it. This needs to describe your goal.

If you select "Write my own goal' in the first box, all options will vanish and a larger 'free text' box will appear in which you can write your goal.

You will also need to choose one of the following from the second dropdown:

- ▼ In order to
- ▼ To provide
- ▼ To ensure
- ▼ To improve

Beside this insert another short phrase in the second blank box.

For example:

To learn more about ⟶ local Māori customs.

In order to ⟶ strengthen local connections.

Entering a goal will automatically generate the text boxes required to plan and document the progress of that goal.

Progress to Meeting Goal

This provides information about the progress toward meeting the goal. The options from the dropdown are:

- ▼ In progress
- ▼ Completed
- ▼ Discontinued
- ▼ On hold

You may discontinue a goal at any time and you will not be penalised for this, provided you replace it. A brief outcome and critical reflection needs to be entered to explain why the goal was discontinued. This provides evidence of engagement with the ePortfolio.

Each Competency should have at least one goal entered by the first three months of practice in the two-year cycle. Not all goals need to be 'in progress' but there needs to be at least one goal active at all times.

You can create additional goals. To add a goal, click the 'Add Goal' button at the bottom of the page. You also have the option to delete these additional goals by clicking the 'Delete' button in the upper right hand of the page.

Professional Development (continued)

Development Activities

These activities are the tasks you plan to complete in order to achieve your goals. You can have as many developmental activities as you like under each goal. To add a Developmental Activity, click the blue button labeled 'Add New Learning Activity'. This opens up an area for you to enter in your activity. There are four parts to the activity.

▼ Development Activity: this is where you describe your activity.

▼ Type of Development Activity: this allows you to select group or individual.

▼ Documentation: this is where you can upload documentation or media that you feel supports the activity. There is no restriction on how many documents you can upload, but large video or audio files may be rejected.

▼ Status: this tells you and any supervisor or auditor looking at your ePortfolio where you are in the activity.

Outcomes
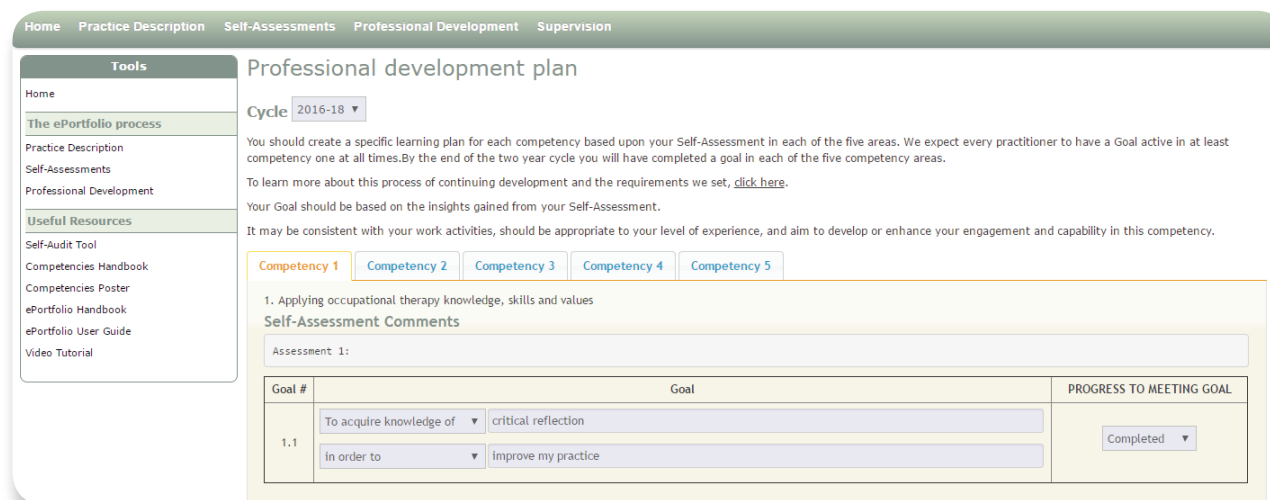
The Outcomes section is where you summarise the completion of each goal. This is free text. On the right you will see a + with questions to consider when writing your outcomes. These are there to assist you and are not compulsory.

Critical Reflection

The Critical Reflection area is where you reflect on your goal and the results you achieved. Ask yourself: How did it go? Did I achieve the expected result? Did it grow my skills? What would I do differently?

On the right of this section are the original guiding questions from the Self-Assessment and some additional questions you can use to assist your reflection.

Remember to save your work with the blue button at the bottom before you change tabs or leave the page.

Figure 6: Professional Development

Supervision

The supervision section is important to have up to date at all times, and needs to be completed for each ePortfolio cycle. It is where you nominate your supervisor and review who your current supervisor is. You can also see who you are providing supervision to (*See Figure 7*).
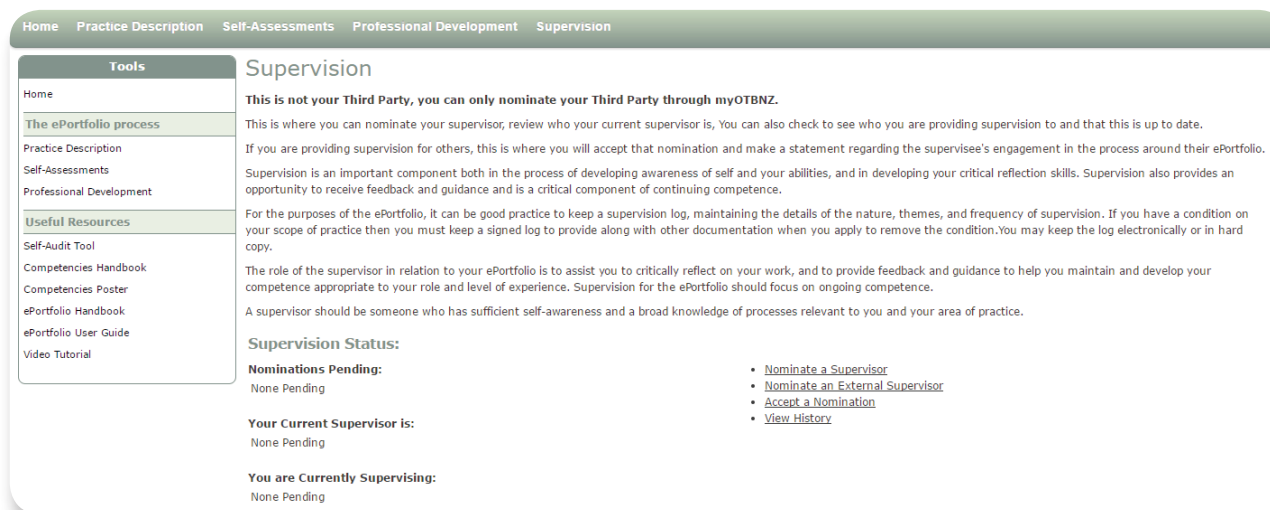
If you are providing supervision for others, this is where you will accept that nomination and when appropriate, tick a statement about the supervisee's engagement in the process relating to their ePortfolio.

To nominate a supervisor or to accept a nomination there are four underlined links at the bottom right of the screen:

▼   Nominate a Supervisor

▼   Nominate an External Supervisor

▼   Accept a Nomination

▼   View History

Nominate a Supervisor

To nominate your supervisor, click the link. This will take you to a list of all current available registered practitioners. You can manually search by scrolling down the list or use the 'Search' box on the top right of the screen. Once you have found the practitioner you are looking for, click on the small box to the left of their name to select them, then scroll to the bottom of the page and click the blue 'Nominate' button. This will send a pending nomination to their account and an email informing them of the nomination request.

Figure 7: Supervision

Supervision (continued)

Beginning a new two-year cycle

At the beginning of a new two-year cycle your supervisor needs to be re-nominated. Your nominated supervisor does not automatically carry over into the next cycle. It is important that there is always a current supervisor nominated as it is part of how OTBNZ can assure safe competent practitioners.

Nominate an External Supervisor

To nominate a non-OT as your supervisor, click the underlined link. A new page will load, where you can enter their name and email address, then select 'Nominate'. This will send them an email informing them of the nomination and supplying a link and account to the system so they can view the necessary areas of your account. (This is for non-OT supervisors: you cannot use this option if you have a condition on your scope of practice.)

Accept a Nomination

When another occupational therapist nominates you to be their supervisor you will be notified via email to the email address you have provided. Any pending nominations in your account will also be listed at the bottom left of the supervision page.

To accept a nomination, click the link. This will take you to the list of your pending nominations and there will be an 'Accept' button at the bottom of the page. The person who nominated you will receive an email confirming your acceptance of the nomination (*See Figure 8*).

Ensure that you have read the Handbook and carry out your responsibilities within ePortfolio as a supervisor.

View History

This link allows you a read-only view of all previous supervision activity in your account. You cannot modify the history of your account. You can, however, print it or download it.

Withdrawing Supervision

To withdraw from your role as supervisor, go to the bottom left of the screen where your current supervisees are listed and select the 'Withdraw' link to the right of their name. Ensure you select the correct one: if you withdraw from the wrong practitioner they must re-nominate you in the system.

Figure 8: Nomination

Occupational Therapy Board of New Zealand
TE POARI WHAKAORA NGANGAHAU O AOTEAROA
FOSTERING FAITH AND CONFIDENCE IN THE PROFESSION

If you need technical assistance:

Email: **enquiries@otboard.org.nz**
Phone: **0800 99 77 55**

OR:

Mary Silcock, OTBNZ Professional Advisor
Email: **mary@otboard.org.nz**
Phone: **(04) 918 4747**