Title:	**Medical Student Portfolio Records Management**	Number:	**046**
Approved By:	Undergraduate Medical Education Committee		
Approval Date:	19 June 2023	Next Review:	01 May 2026
Effective Date:	19 June 2023		
Audience:	Students, Faculty and Staff		
Purpose:	The policy defines the standards of access for Portfolio content on Entrada.		
Related Policies and Procedures:	1. Medical Student Academic Records Management (#041)		
Exclusions:	None		
Calendar Statement:	None		
Contact:	Portfolio Pillar Lead		

Definitions

Assessment	The methods and tools used to evaluate, measure, and document the academic readiness, learning progress, skill acquisition, or educational needs of students. Results are used to inform academic advising, progress, and promotion decisions.
Portfolio Assignment	Portfolio assignments include submissions such as narrative assignments, reflections and critiques.
Portfolio Coach	The Portfolio Coach is a faculty member who supports the medical student in developing key transferable competencies concerned with critical reflection and the self-regulation of learning. They enable the process of critical thinking and reflection by students through the learning groups (1 coach to 7-9 students) and formative feedback of the student's portfolio.
Student	An individual enrolled in the UBC MD Undergraduate Program (MDUP).

Preamble

Portfolio provides a safe, supported space for students to learn intentionally through practice by setting goals, guided self-reflection, and deliberation using selected assessment data to evaluate performance. The goal of Portfolio is to enable students to become competent, reflective practitioners (i.e., self-regulated learning). Students are organized into small groups and are assigned a Portfolio Coach. Portfolio also includes an electronic platform for gathering evidence of learning through entries such as learning plans, journals of clinical experience, and written reflections.

Portfolio is one of the four assessment modalities in the MDUP as a part of the programmatic assessment framework. The students attend a pre-specified number of Portfolio sessions each academic year and submit Portfolio assignments outlining their reflections before and/or after the session using Entrada. The contents of these assignments are confidential, and except for the assigned Portfolio Coach, neither faculty nor the program staff are allowed to review these assignments.

This policy defines the standards of access for Portfolio content on Entrada.

Policy

1. Access to and disclosure of Portfolio submission contents will be limited to the student and those members of the UBC faculty and administration with a need to access the information to perform their duties. There will be no disclosure to third parties unless written consent for disclosure has been provided by the student or disclosure is pursuant to applicable legislation or court order, or as otherwise required by law.
2. The medical student Portfolio assignment submission is confidential. Student reflections (written and verbal) are confidential and should not be shared by the Portfolio Coach with a third party unless the coach perceives a potential safety risk to the student, coach, or another person, or unless written consent is provided by the student. In these situations, the Portfolio Coach should contact their Portfolio faculty lead for advice on how to best proceed.
3. The Portfolio Coach's access to the student's Portfolio assignment submission on Entrada will be restricted to the time until the student graduates or leaves the MDUP.
4. After the student graduates or leaves the MDUP, access to their Portfolio submission on Entrada will be limited to the Portfolio & Assessment Coordinator, Provincial Learner Assessment Team (PLAT), Program Managers, Assessment & Evaluation Coordinator at each distributed site, and Digital Solutions team.

Procedure

1. **Oversight and management of the Portfolio submissions**
   1.1. The MDUP oversees the management of Portfolio submissions in Entrada with the assistance from the following key staff:
      - Portfolio & Assessment Coordinator, PLAT
      - Assessment & Evaluation Coordinators, all sites
      - Digital Solutions team
   1.2. Access to Entrada does not confer the privilege of reviewing the contents of the student reflections included in the Portfolio assignments. Staff are advised that review of the contents of students' Portfolio submissions will be considered a breach of student confidentiality.

2. **Student access to their Portfolio submissions**
   2.1. During their time in the MDUP, the students will have continued access to their Portfolio assignments submitted on Entrada starting from year 1.

   2.2. Students can request an electronic copy of their Portfolio submissions or specific contents by email to the Regional Associate Deans and Program Managers according to the retention schedules under the authority of the Board of Governors Records Management Policy (GA4), sections 2.2.
3. **Coach access to Portfolio submissions**
   3.1. Students are required to submit their Portfolio assignments only through Entrada. Other communications methods such as emails and file sharing via Dropbox are prohibited.
   3.2. The contents of the assignments will be reviewed and marked by the student's designated Portfolio Coach in Entrada.
      3.2.1. Exception- Access will be provided to the substitute Portfolio Coach in the event of a Portfolio Coach absence (temporary or permanent).

3.2.2. Exception- If there is an appeal by a student regarding the Portfolio grade or feedback, access to the Portfolio assignment will be provided to the Portfolio Site lead and/or the Portfolio Pillar lead to review the assignment.

Review History

Action	Committee	Date	Status
Drafted	Student Assessment Subcommittee	6 September2022	Endorsed
Reviewed	Policy Advisory Subcommittee	20 October 2022	Revised
Reviewed	Policy Advisory Subcommittee	15 December 2022	Revised
Reviewed	Student Affairs and Program Managers	11 January 2023	Edited
Reviewed	Student Assessment Subcommittee	17 May 2023	Endorsed
Reviewed	Legal Counsel	9 June 2023	Revised
Reviewed	Undergraduate Medical Education Committee	19 June 2023	Approved