

Procedure for persons working with clients using My Portfolio App

This procedure has been prepared as part of the project *“Supporting the Further Development of the Integrated Qualifications System in Poland (IQS6)”*, implemented by the Educational Research Institute – National Research Institute and co-financed by the European Funds for Social Development.

My Portfolio is a free application that enables users to collect information about competences acquired in various areas of life activity, add evidence confirming the possession of those competences, and plan further development.

Work with the My Portfolio tool may be carried out independently (using a **“user account”**) or with the support of another person – a career counsellor, coach, teacher, mentor or personal development specialist (using a **“counsellor account”**).

The procedure below is addressed to persons supporting the development of others, in particular by assisting with the identification of competences, discovering individual potential and planning development. For this group of users (hereinafter referred to as the **“counsellor”**), the **“counsellor account”** is intended.

Any person who requires support in creating their portfolio may benefit from such assistance – including an unemployed person, a jobseeker, a person wishing to change their career, a learner or a student. For this group of users (here and after referred to as the **“client”**), the **“user account”** is intended.

User account	Counsellor account
It is an account intended for a person who wishes to create a portfolio and development plans, i.e. the client.	It is an account intended for persons who view and consult the content of other users’ portfolios, i.e. the counsellor.
Within this account, users can collect experiences, competences and evidence, create folders and CVs, share their content with, and use the built-in messaging tool.	This account does not allow the creation of one’s own portfolio; however, it enables communication with the person who has shared their portfolio or selected parts of it (folders or CVs).
Each new account created in My Portfolio is, by default, a user account.	To create a counsellor account, the appropriate option must be selected during the registration process.

To guide a client through the My Portfolio application, the following steps should be taken:

Step 1. Identifying the individual's goal

Everyone, even if they are just starting their professional career or returning to the labour market after a long break, possesses knowledge, skills and social competences that they can showcase, as well as competences they wish or could develop further.

When beginning work with a client, the counsellor may ask the following questions:

1. What does the person want to achieve?
2. What does the person need the portfolio for?

The answers to these questions enable the counsellor to determine which aspects should be prioritised when introducing My Portfolio. Although the tool itself is the same, it can support clients in achieving different goals.

The tool consists of the following modules:

1. **“My Portfolio”** – in this section, the user records their competences and adds evidence of them based on an analysis of their own experience,
2. **“Folders and CVs”** – this module allows the user to create thematic folders and CVs and share them with the counsellor,
3. **“Development plan”** – this section enables the user to record a goal and define the steps leading towards its achievement,
4. **“Messages”** – a messaging tool that allows the exchange of messages and files with the counsellor directly within the application.

Examples of client's goals

- Finding or changing employment – in this case, the client is likely to be primarily interested in documenting their knowledge, skills and social competences and in collecting relevant evidence (module 1), followed by preparing a CV (module 2).
- Obtaining new qualifications [through validation](#) – in this case, the main emphasis should be placed on documenting competences corresponding to a given qualification and matching appropriate evidence to them (module 1), as well as on planning activities necessary to develop missing competences (module 3).



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It is worth noting that My Portfolio allows users to preview the content (i.e. learning outcomes) of diplomas awarded within the educational system as well as other qualifications included in the Integrated Qualifications System, as the tool is synchronised with the [Integrated Qualifications Register](#).

- Collecting information about one's experience, competences and evidence in one place – My Portfolio allows users to upload files (e.g. work samples, certificates, references from colleagues) that confirm the possession of specific knowledge, skills and social competences. The client may wish to use the tool as a dedicated repository from which they can draw in various situations; in this case, module 1 will be of primary importance.

Step 2. Discussing what is most important in My Portfolio – competences and evidence

The My Portfolio tool supports the idea of lifelong learning, according to which learning can take place at any time, regardless of age, place or mode. Within this approach, what matters most are the outcomes – namely the competences that a person genuinely possesses and is able to demonstrate.

For this reason, it is important to collect information about experience, the competences developed through this experience, and to gather evidence that can be used to convince others (e.g. an employer) that a person possesses specific knowledge, skills or social competences.

My Portfolio also encourages self-reflection, prompting questions such as: *What can I actually do? What am I good at? What competences do I have if I undertake certain activities or perform well in specific situations?* It also promotes the habit of analysing life experiences from a competence-based perspective, identifying both strengths and areas for development.

Therefore, in My Portfolio, fields relating to **experience** are completed first, followed by the entry of **competences** associated with experience.



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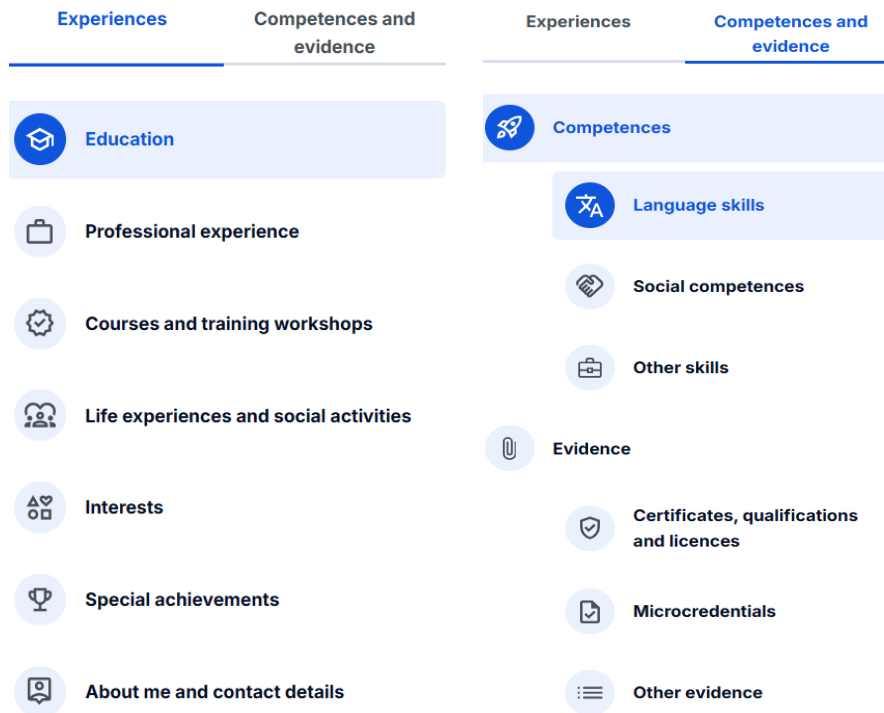


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Step 3. Identifying and naming client's competences and determining the evidence that can be collected to confirm them

The counsellor works with the client to review their experience and encourages them to reflect on the actions they undertook within this experience. The client is asked to consider which skills or knowledge supported the achievement of these actions, whether they felt that any competences were lacking, what the outcomes of their actions were and what feedback they received on them.

Once the client's key competences have been identified, the counsellor supports the client in naming them appropriately.

Where can competence names be sourced from?

- **Job advertisements** often include lists of required knowledge and skills. These can be used as a reference, especially if the client is preparing for a job interview.
- **Curricula and examination requirements** may also serve as useful reference points when analysing competences.

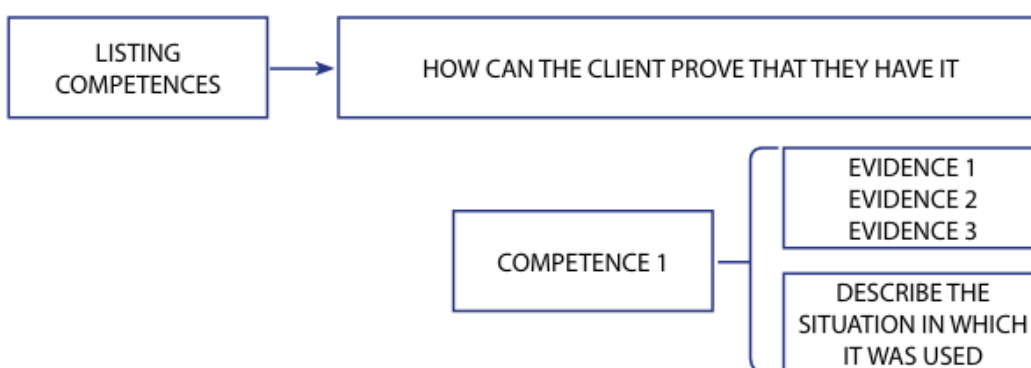
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- **My Portfolio is linked to the Integrated Qualifications Register**, which contains all qualifications included in the Integrated Qualifications System (including diplomas awarded within formal education). When the client begins typing in the designated field, the system suggests competences derived from qualifications recorded in the Register.
- It is recommended to define competences as precisely as possible, for example by using **operational verbs** (such as *“analyses”, “performs”, “applies”*). This makes it much easier to match appropriate evidence to the identified competences.

In the next step, the counsellor supports the client in considering what evidence can be provided to confirm the identified competences. The process is illustrated in the diagram below:



Source: Author’s own elaboration

It is worth emphasizing that a single piece of evidence may confirm the possession of different competences. At the same time, one competence can be supported by various types of evidence.

What can serve as evidence of competences?

Evidence can be anything that demonstrates the possession of specific knowledge, skills and social competences. For this reason, a school graduation diploma may constitute evidence, as it represents a qualification (and therefore confirms competences). In contrast, an employment certificate does not constitute such evidence, as it contains information about employment history



rather than about what the employee knows and is able to do.

It should be borne in mind that evidence is not limited to diplomas, certificates and formal attestations. This is particularly important as such documents often describe an educational pathway rather than its actual outcomes.

Examples of evidence include:

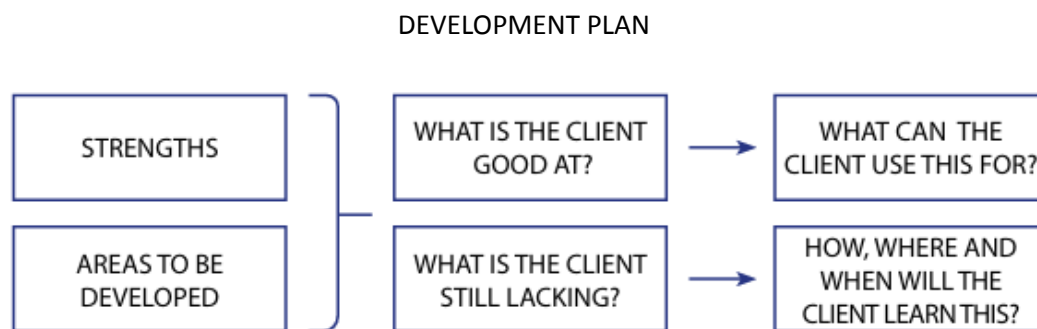
- work samples, e.g. a completed product or a written article,
- photographs of completed work,
- recordings documenting the process of creating something or carrying out a specific activity,
- recommendations from colleagues, supervisors or clients referring to specific competences,
- assessments of actions, for example in the form of evaluation results,
- documentation from the work process,
- descriptions of one's own actions, in particular behaviours in challenging situations, undertaken challenges or obstacles that have been overcome.

Evidence should meet several basic criteria. It should be:

- authentic,
- appropriately matched to the competence,
- sufficient,
- up to date.

Step 4. Demonstrating how the client can prepare development plans

Once the client has prepared their portfolio, they should already be aware of their strengths and weaknesses. They can therefore create a plan of further actions (as illustrated in the diagram below).



Source: author's own elaboration

The “Development Plan” module

The “**Development Plan**” module makes it possible to use My Portfolio in the process of conducting a [Skills Audit Method](#) (more information on this can be found in the box *What is a Skills Audit Method and how can My Portfolio be used within it?*). However, development plans can be used by **any user** of the tool.

When discussing this module, the counsellor should bear in mind that, although it is not mandatory, it is beneficial for the client to reflect on their goals and on how these goals can be achieved.

Preparing a development plan begins with defining the goal that the client wishes to achieve. The goal is entered into the tool, which then generates a timeline. Below is a visual example of a development plan in the My Portfolio application.



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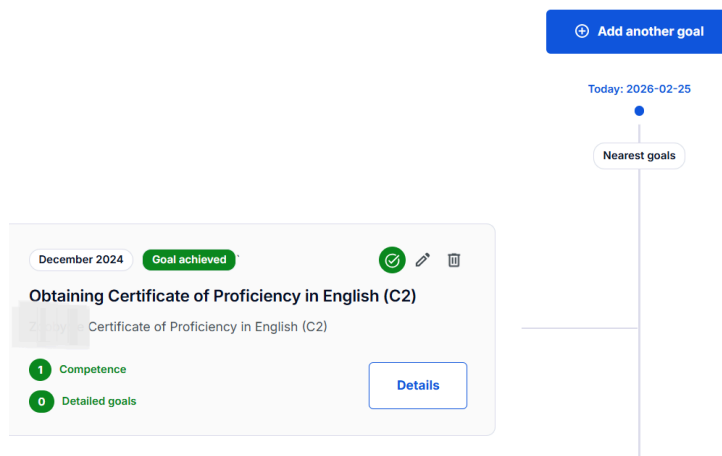


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Regardless of the client's goal, the counsellor may ask (or help the client answer) the following questions:

1. What is your goal?
2. What steps or actions are required to achieve this goal?
3. What factors may influence the achievement of the goal?
4. What do you need to know in order to achieve the goal?
5. What obstacles may arise?
6. Who can help minimise them?
7. How much time are you giving yourself to achieve the selected goal?
8. If you achieve your goal, what will change in your life?

How to define a goal effectively? The SMART rule

A goal that follows the SMART principle is:

- **specific** – clear and unambiguous;
- **measurable** – the level of achievement can be assessed;
- **achievable** – an overly ambitious goal may undermine confidence in achieving it;
- **relevant** – a meaningful step forward and important to the person who will pursue it;
- **time-bound** – a timeframe for achieving the goal has been defined.

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Sharing portfolio content with others

Some users will use the tool solely for their own purposes, while others may wish to share the content of their portfolio. Depending on the client's goal, there are several ways to do so.

The client may share with others:

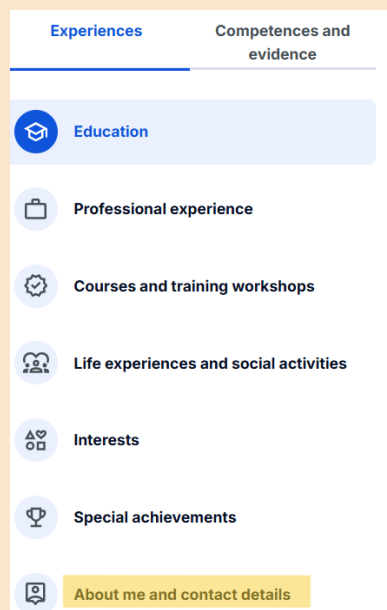
1. a **folder** containing all or selected experiences, competences and evidence confirming their possession – this is done using the **“Folders and CVs”** module. The user creates a collection of competences and evidence (a folder), which can then be shared with individuals registered in My Portfolio who have a professional account, or downloaded as a **PDF file** and sent by email to any chosen recipient.

Due to personal data protection requirements, only individuals who have a counsellor / employer / employee of awarding body account are displayed in the list of available recipients.

2. a **CV** containing user-selected experiences and a list of competences – this is done using the **“Folders and CVs”** module. The user prepares a CV based on selected sets of competences (folders) and then shares it with individuals registered in My Portfolio or downloads it as a **PDF file** and sends it by email to any chosen recipient.

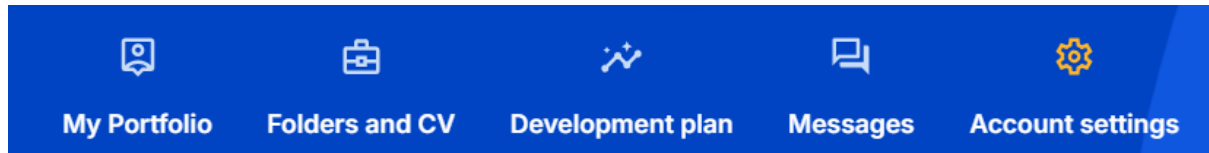
It should be noted that the user's personal data is automatically transferred to the CV from the **“About me and contact details”** section.

If the user does not complete this section, the CV will not contain any contact information.



3. A **specific file**, containing, for example, a piece of evidence (also before it is added to the portfolio) – this is done using the **“Messages”** module, which is described in more detail in the section *Communicating with other My Portfolio users via the built-in messaging tool*. The user sends the file as an attachment to a message.

4. **The entire content of their profile**, including the development plan – this option is available in the **“User Account Settings”**.



Share your account with a counsellor, employer or an employee of an awarding body

Sharing the account means that the counsellor can view:

- a) the client’s portfolio (competences and evidence),
- b) all folders created by the client (collections of competences),
- c) all CVs created by the client,
- d) the development plan.

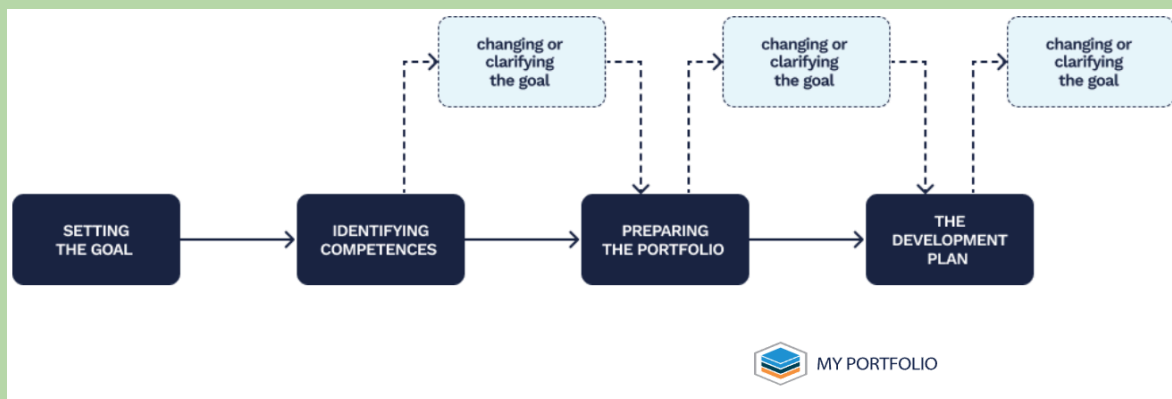
The counsellor does not have access to the client’s personal data, except for those that are transferred to the CV. The counsellor is also unable to make any changes to the client’s account and may only provide feedback to the client.

The account sharing function is primarily intended to support cooperation with a counsellor in the skills audit process.

What is The Skills Audit Method and how can My Portfolio be used within it?

The Skills Audit Method is used to identify, describe and document an individual's knowledge, skills and social competences, as well as to prepare development plans. This process is most often conducted by a career or educational counsellor.

In 2015, the Educational Research Institute, in cooperation with the Regional Labour Office in Kraków, developed the **Skills Audit Method**. The diagram below illustrates the assumed course of such a competence balance process.



Source: author's own elaboration

As shown above, **My Portfolio** can be used as a tool within the **Skills Audit Method**, in which the client records competences identified jointly with the counsellor, collects evidence, and documents their development plan.

More information on this topic can be found on the Skills Audit Method website (<https://mbk.ibe.edu.pl/en/about-the-skills-audit-method/>) and in the publication *"The Skills Audit Method. A Practical Guide for Counsellors"*.

Communication with other My Portfolio users via the built-in messaging tool

The **Messages** module enables communication between clients and counsellors, as well as the exchange of attachments. It is described in detail, as it forms the basis for cooperation between the counsellor and the My Portfolio user.

To start a conversation, the user should enter the **"Messages"** module and click the **"+"** button. A window will appear in which the email address of the person to whom the message is to be sent should be entered. If the person is registered in My Portfolio, they will appear on the list.

Messages



New message ×

Search thread by contact

Recipient *

Enter an email address or select from the list

User account:

A user who wishes to initiate a message exchange will see **only counsellors' / employers' / employees of the awarding bodies' email addresses** on the list. Other users will not be visible.

Counsellor / employer / employee of the awarding body account:

A counsellor/ employer / employee of the awarding body will see **only users' email addresses** on the list of potential recipients and will not see other counsellors.

Once a specific person is selected from the list, a conversation window will appear. Within this window, it is possible to write a message and send an attachment.

How can the Messages module be used?

The module enables immediate communication and is the **only way in My Portfolio to ensure two-way information flow**. Good practice shows that:

- before sharing portfolio content (either a specific folder or the entire profile), it is advisable to send a message informing the recipient of this intention;
- before adding a piece of evidence to the portfolio that the client is not entirely confident about, it may be sent as an attachment to the counsellor for consultation.

Summary

Responsibilities of the counsellor	Responsibilities of the client
Creating a counsellor account in My Portfolio Introducing the client to the basic functionalities of My Portfolio Establishing rules of cooperation, especially when My Portfolio is used within the Skills Audit Method Maintaining confidentiality Supporting the client by: <ul style="list-style-type: none"> • motivating them, 	Creating a user account in My Portfolio Becoming familiar with the My Portfolio tool Being honest when describing competences and experience Completing contact details (if they intend to generate a CV) Entering their experience, competences and evidence in the My Portfolio module Sharing portfolio content with the counsellor

<ul style="list-style-type: none">• answering questions, consulting shared content and received documents	within the previously agreed scope
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Useful links and materials

My Portfolio: <https://mojeportfolio.ibe.edu.pl/>

Skills Audit Method: <https://mbk.ibe.edu.pl/en/about-the-skills-audit-method/>

Integrated Qualifications Register: <https://kwalifikacje.gov.pl/k>

Information on validation (Educational Research Institute):

<https://kwalifikacje.edu.pl/baza-wiedzy/skorzystaj-z-zintegrowanego-systemu-kwalifikacji-zsk/walidacja/>

Information on operational verbs (Validation Methods Catalogue):

<https://walidacja.ibe.edu.pl/metody/en/operational-verbs>

Pierwieniecka, R., Cichowska, Z. (2020). *The Skills Audit Method. A Practical Guide for Counsellors*. Educational Research Institute, Warsaw:

<https://mbk.ibe.edu.pl/wp-content/uploads/2022/01/Skills-Audit-Method.pdf>

Data: 10.03.2026 r.