ROYAL PHARMACEUTICAL SOCIETY

# Post-registration Foundation Pharmacist Credentialing

# E-portfolio guide for Educational Supervisors and Designated Prescribing Practitioners (Portfolio collaborators)

Version 2.1
Last updated: 19/07/22

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**Update 19/07/22**

**The following sections have been added:**

- 8.12 Multi-source feedback

# 1 Introduction

The E-portfolio is designed to support pharmacists and their educational supervisor/designated prescribing practitioner to record and compile learning and assessment evidence against the requirements of the Royal Pharmaceutical Society (RPS) post-registration foundation pharmacist curriculum.

Educational supervisors and designated prescribing practitioners will support pharmacists who are developing evidence as part of a structured training programme and will have full access to the individual's E-portfolio.

# 2 Using the E-Portfolio

This technical user guide outlines the main functions of the E-portfolio for **educational supervisors** and **designated prescribing practitioners**. Please note that the images provided in this guide have been captured from a desktop device; there may be a small difference in styling if you are using a tablet or mobile device.

This section contains general information on the technical functionality of the E-portfolio.

**TIP:** For the best user experience, we advise that you use the E-portfolio on a desktop, as you may be entering a lot of text in certain sections and fields and a wider screen enables you to view all the necessary elements.

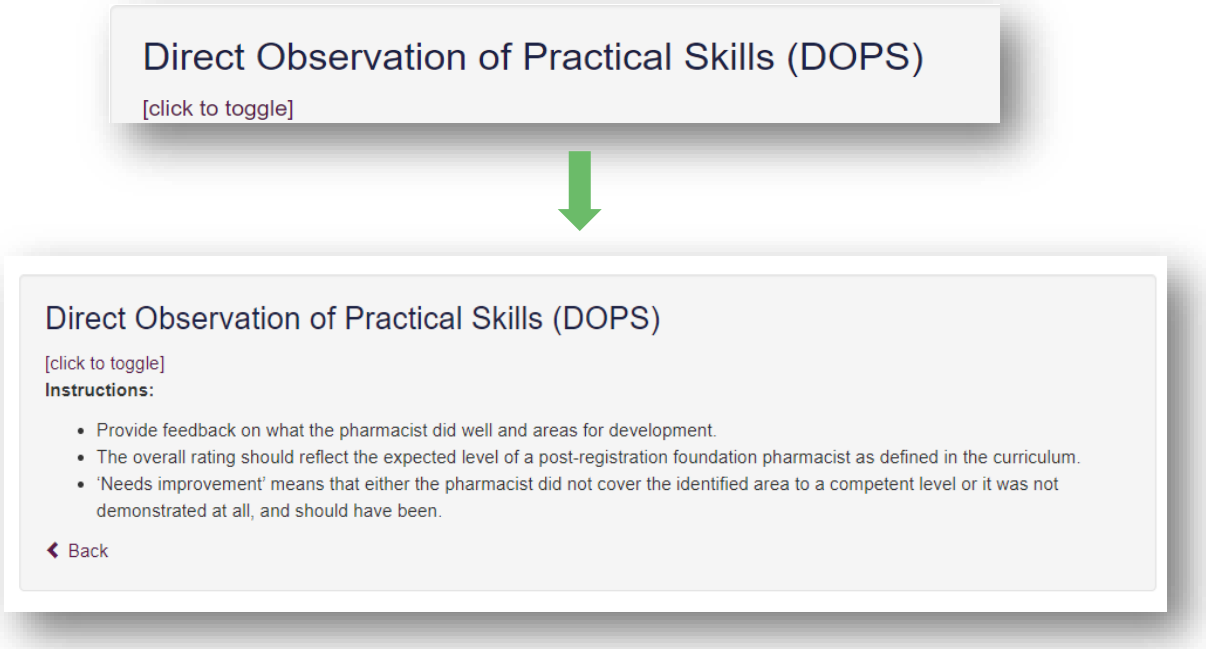
You should use this guide in conjunction with the RPS post-registration foundation curriculum resources and guidance.

## 2.1 Help and additional information

We have included additional help information throughout the E-portfolio to explain what you need to do.

You will have an option to **"click to toggle"** or a question mark symbol.

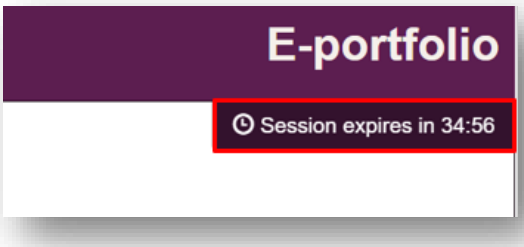
Select these to get more details on the section you are viewing, and you will see a hint or additional information about what you should include and take into consideration. An example of the **"click to toggle"** option is shown below.




## 2.2 Session Timer

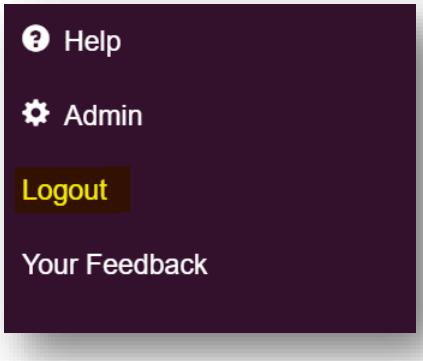
You will notice a timer in the top right-hand corner of the screen. This is a countdown of inactivity. If you are inactive for a period of 35 minutes, you will automatically be logged out of the E-portfolio. It is important you save your work regularly as there is no autosave function.

The timer resets to 35 minutes each time you interact with the E-portfolio, such as clicking a button, or completing a form. Please note that simply moving your cursor around on the page is not considered as an interaction.




## 2.3 Logging out

You can find the "**Logout**" button in the navigation menu on the left of your screen. You can logout at any point, but before you do so, make sure you save any necessary text and edits.



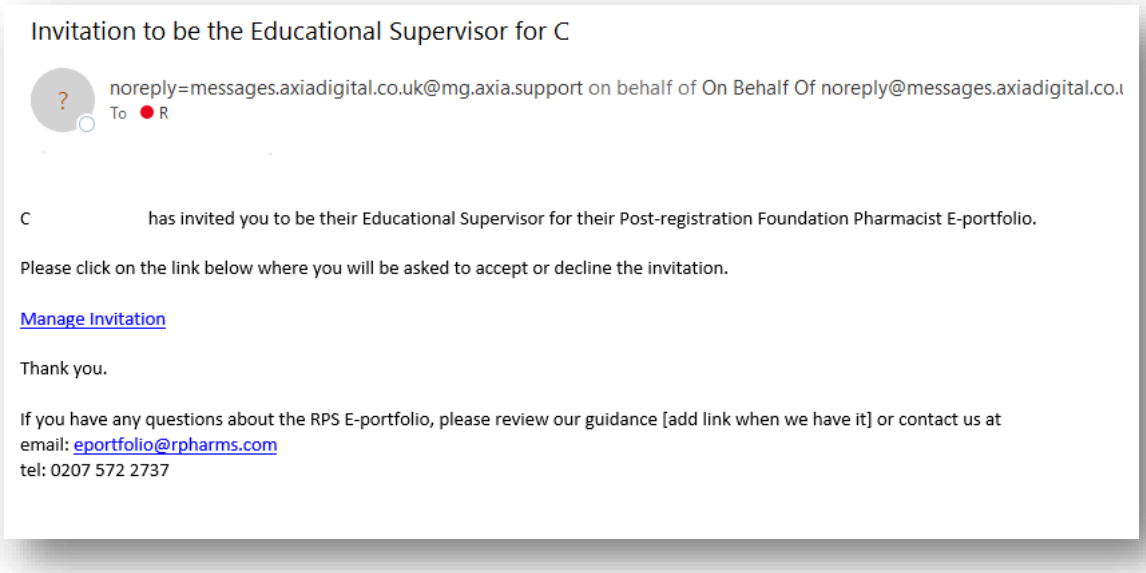

**TIP:** If you are using a shared device, remember to logout to avoid other users accessing your E-portfolio.

# 3 Getting Started

## 3.1 Accessing the E-portfolio

The E-portfolio can be accessed from the RPS website. If you are a member of the RPS, you will be able to access the E-portfolio using your usual RPS login details (membership number or email address and password).

To access your learner's E-portfolio, they need to invite you to be a **portfolio collaborator**. When they do so, you will receive an email with a link to their E-portfolio, which you can either accept or decline.


Invitation to be the Educational Supervisor for C

noreply=messages.axiadigital.co.uk@mg.axia.support on behalf of On Behalf Of noreply@messages.axiadigital.co.

To R

C has invited you to be their Educational Supervisor for their Post-registration Foundation Pharmacist E-portfolio.

Please click on the link below where you will be asked to accept or decline the invitation.

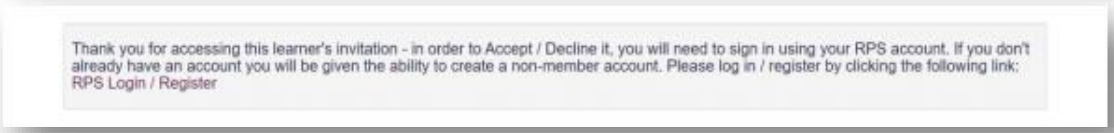
Manage Invitation

Thank you.

If you have any questions about the RPS E-portfolio, please review our guidance [add link when we have it] or contact us at email: eportfolio@rpharms.com
tel: 0207 572 2737

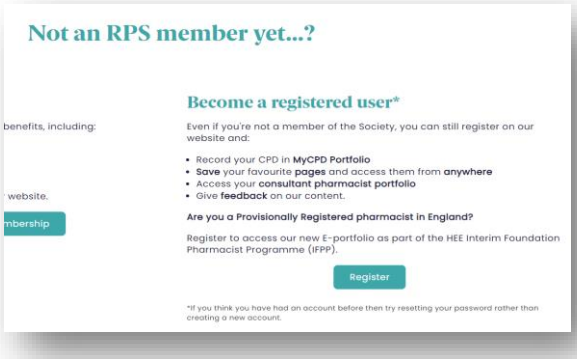
If your learner has invited you through the E-portfolio but you have not received an email, please ask them to re-send the email; they should be able to do this within the platform.

When you click on the link to accept their invitation you will see this screen:

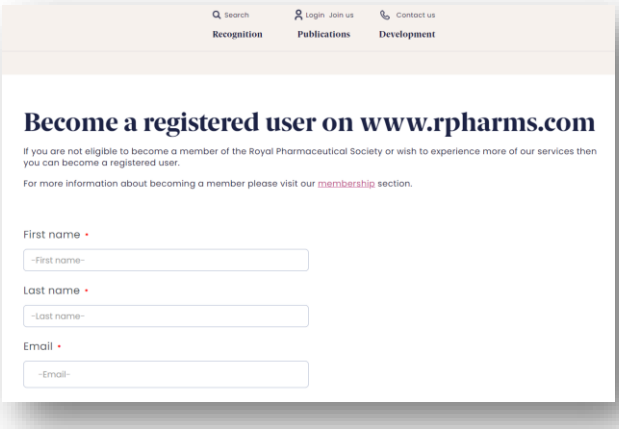



If you are a RPS member, you will be prompted to enter your RPS login details.

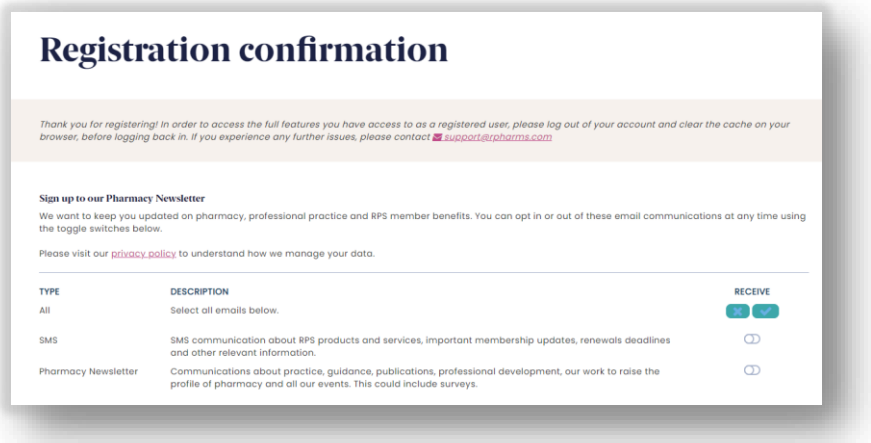
If you are not a RPS member, you will need to scroll down the login page and click "'**Register**".




You will then need to complete a short registration form.



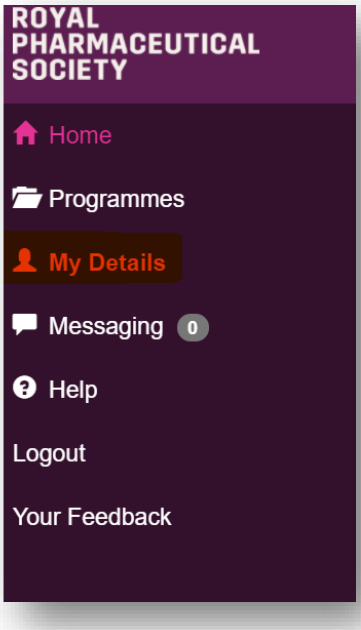

When all the fields are completed, accept the terms and conditions and then click '**Register**'.




Once registered, login to the E-portfolio here.

### 3.1.1 Viewing your details

To access your details, select "**My Details**" from the navigation menu.

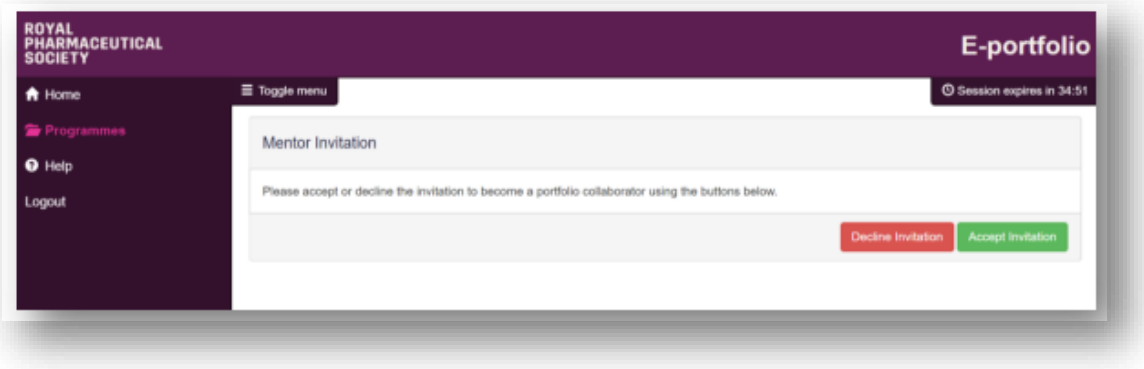



A page with your details will appear.

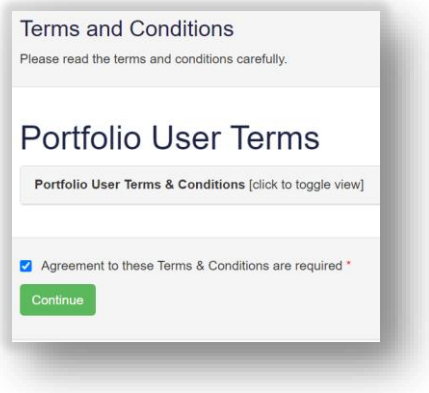
**Please ensure you check that your details are correct within the E-portfolio. Should there be any incorrect details, please contact eportfolio@rpharms.com**

## 3.2 Viewing your learner's E-portfolio

You will then need to access the E-portfolio here. Once logged into the E-portfolio, you will see this invitation to accept or decline the invitation. You will also need to agree to the terms and conditions for accessing the E-portfolio.

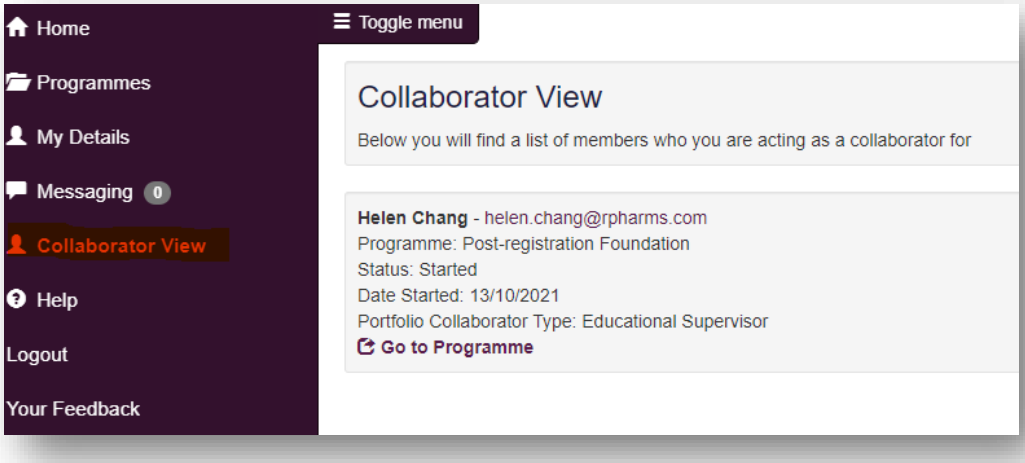



Click the tick box and select "**Continue**" to accept the terms and conditions.

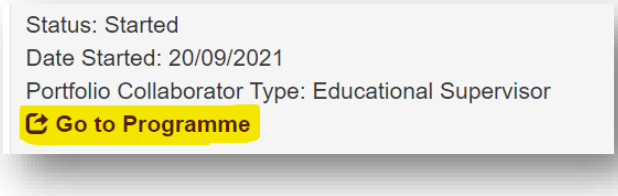



Once you have accepted the invitation and the terms and conditions, you will be able to view the full content of your learner's E-portfolio including contributions from other collaborators.

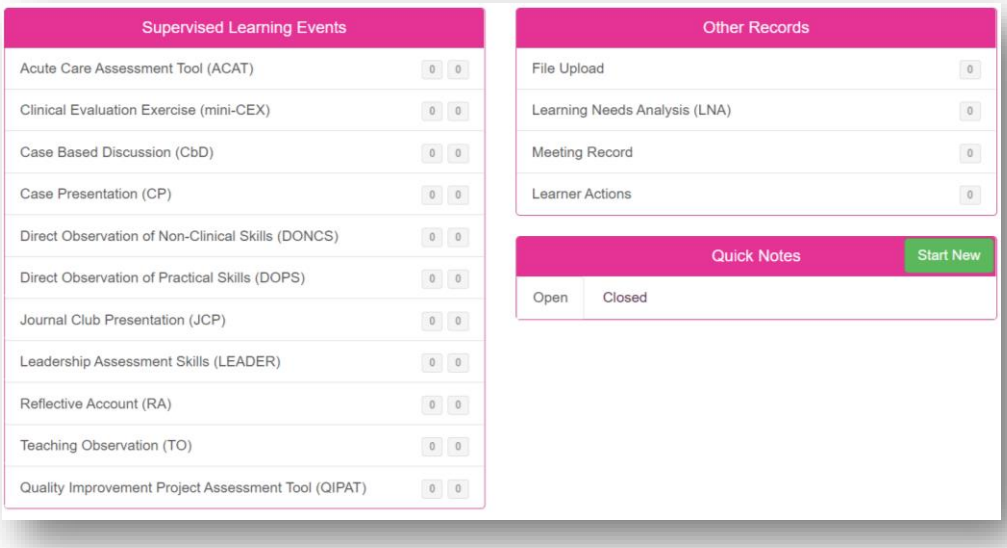
After you have been successfully linked to your learner you will have a new tab in the navigation menu titled "**Collaborator View**". Select this to view the full list of learners you are linked to.




Selecting "**Go to programme**" will open the learner's programme and allow you to access their records or add records to their programme.



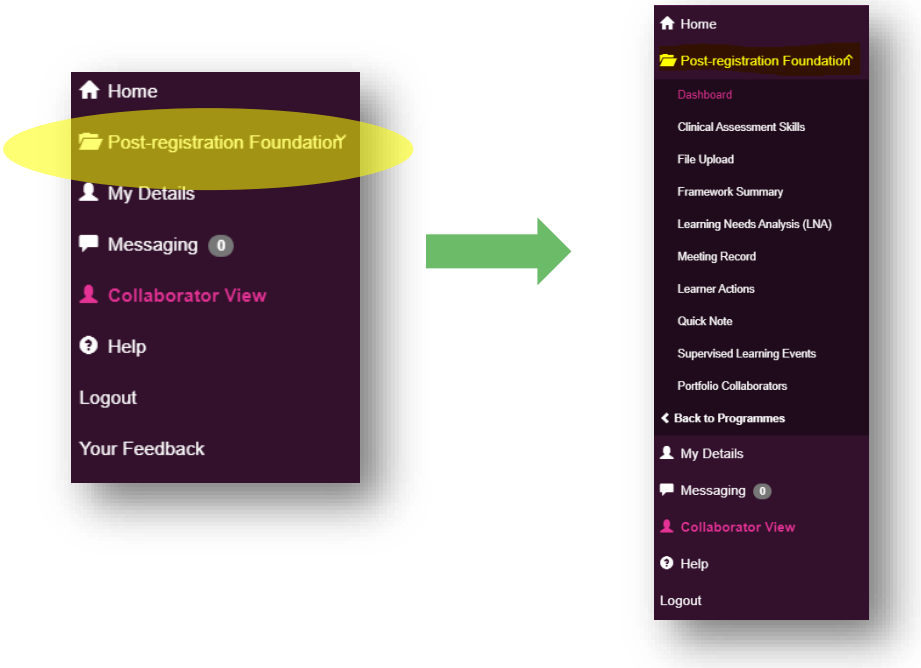

You will then see your learner's dashboard.




**NOTE:** Your learner controls who has access to their E-portfolio and can revoke access at any point, for example, if they move organisation or change roles. If you experience any issues with accessing a learner's portfolio, as a first step, you should check that they have given you access and are linked to you. If they have given you access but you are still experiencing issues, please contact the RPS for further assistance

## 3.3 The navigation menu

When you open your learner's post-registration foundation E-portfolio, select "**Post-registration Foundation**" on the navigation menu to expand it and then selecting any of the items listed to take you to the item's summary page.




## 3.4 Collaborators and permissions

There are two different collaborator roles within the E-portfolio and depending on the training programme, learners may require one or more of these roles to access their E-portfolio.

| | Portfolio collaborator | Ticketed collaborator |
|---|---|---|
| Who does this include? | Educational supervisors and designated prescribing practitioners | Practice supervisors and other members of the pharmacy and wider team |
| What do they do? | Overall responsibility for supervision and management of educational programme either for the duration (educational supervisor) or period of learning in practice (designated prescribing practitioner) | Observe the learner and make judgments about their performance using a supervised learning event |
| What can they access? | Full access to their learner's E-portfolio | Only the form(s) or record(s) shared with them |
| How do they access? | The learner invites them to set up an E-portfolio account linked to their account | The learner emails the form or record via a ticketed process |

### 3.4.1 Portfolio collaborators

As an educational supervisor and/or designated prescribing practitioner you are known as a **portfolio collaborator** and have full access to your learner's E-portfolio.

### 3.4.2 Ticketed collaborators

It is likely that your learner will wish to seek feedback from other colleagues during their training programme who are neither their educational supervisor nor designated prescribing practitioner. This could be a practice supervisor who provides day-to-day supervision in the workplace and may undertake a few supervised learning events and/or other members of the pharmacy/wider team who undertake multiple supervised learning events, or do them as a one off. It is not necessary for these individuals to be portfolio collaborators and have full access to the learner's E-portfolio like you do. Instead, these individuals are called 'ticketed collaborators' and will provide feedback to support your learner's learning and development. The process for seeking feedback from ticketed collaborators is known as a ticket, e-ticket, or e-ticketing. Tickets are created for individual assessment tools or forms and the learner may send several tickets for different tools or forms to the same ticketed collaborator. The ticketed collaborator will then need to access and complete each form separately.

**NOTE:** This process only provides ticketed collaborators 'one-time' access to complete a single assessment tool or form. If you would like a collaborator to provide feedback on more than one assessment tool or form, then you will need to send them a ticket for each one.

### 3.4.3 User roles

The table below outlines the different tools and who has access to each tool.

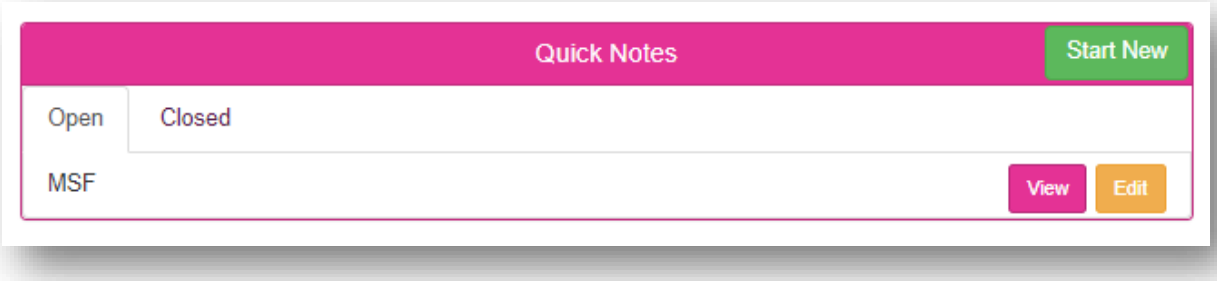
| Tool | Learner | Educational Supervisor | Designated Prescribing Practitioner | Ticketed Collaborators e.g., practice supervisor |
|---|---|---|---|---|
| **Dashboard** | ✓ | ✓ | ✓ | No access |
| **Learner Actions** | ✓ | ✓ | ✓ | No access |
| **Framework Summary** | ✓ | ✓ | ✓ | No access |
| **File upload** | ✓ | ✓ | ✓ | No access |
| **Learning Needs Analysis** | ✓ | ✓ | ✓ | No access |
| **Meeting record** | ✓ | ✓ | ✓ | No access |
| **Reflective account** | ✓ | ✓ | ✓ | No access |
| **Supervised learning events** | | | | |
| **Acute care assessment tool (ACAT)** | ✓ | ✓ | ✓ | Access via ticket link |

| | | | | |
|---|---|---|---|---|
| **Case-based discussion (CbD)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Case presentation (CP)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Leadership assessment skills (LEADER)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Direct observation of practical skills (DOPS)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Direct observation of non-clinical skills (DONCS)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Journal club presentation (JCP)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Mini clinical evaluation exercise (Mini-CEX)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Quality improvement project assessment tool (QIPAT)** | ✓ | ✓ | ✓ | Access via ticket link |
| **Teaching observation (TO)** | ✓ | ✓ | ✓ | Access via ticket link |

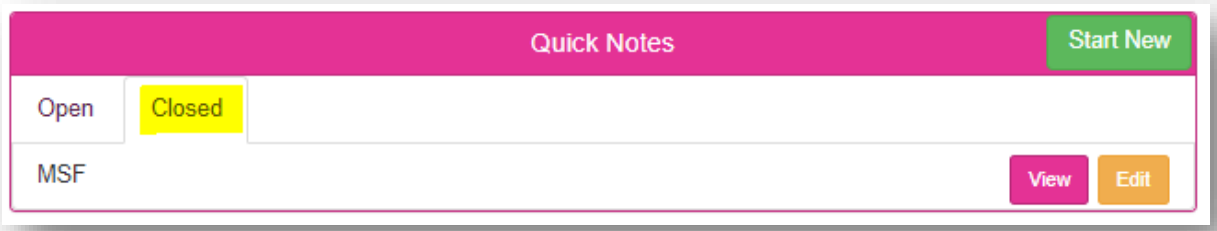
## 3.5 Quick notes

This tool is like a post-it note within the E-portfolio. Your learner can make a note that may be a reminder or the starting point of a piece of evidence that they wish to develop fully at a later point.

You are able to view and edit your learner's quick notes from their dashboard by selecting "**View**" or "**Edit**".



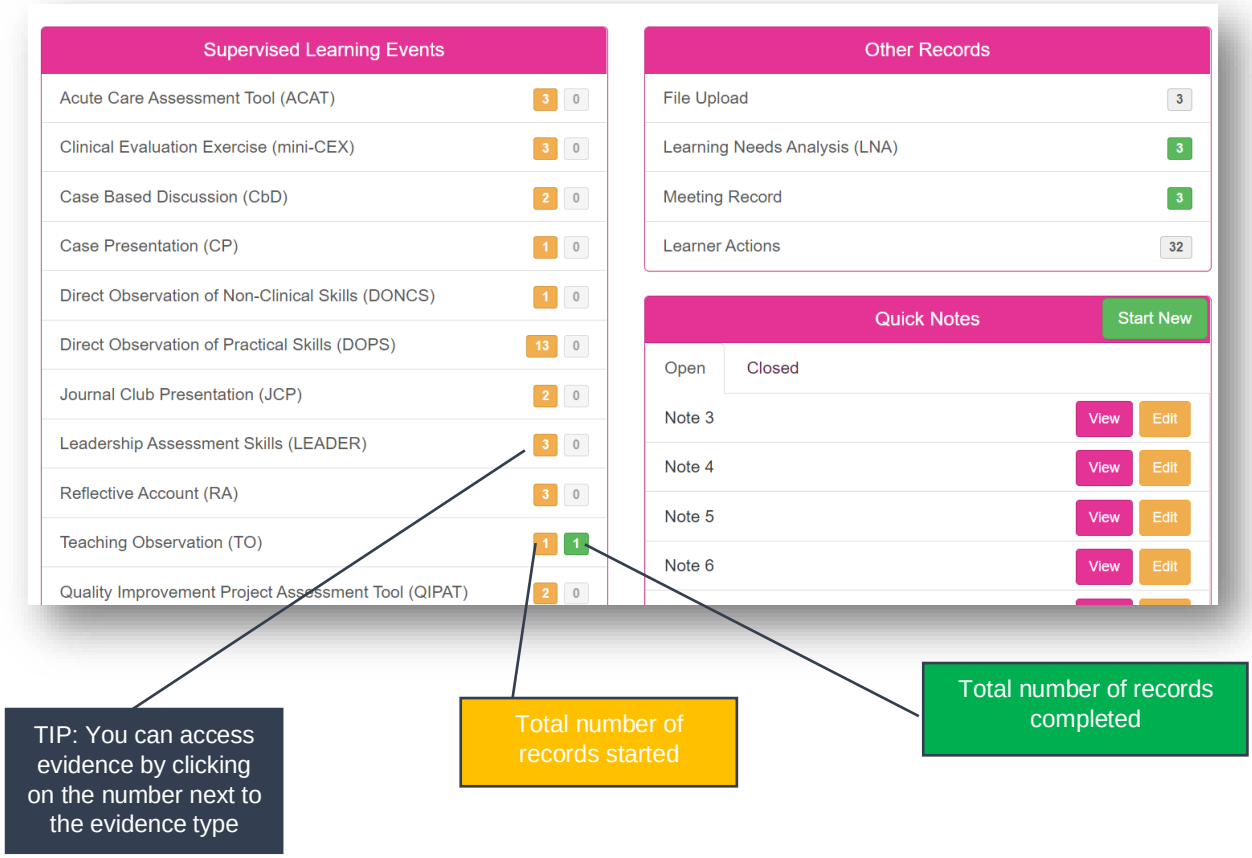

When the learner has finished with their quick note, they can 'close' it and it will move from the list of 'open' to 'closed' quick notes.




# 4 Monitoring and reviewing your learner's progress

## 4.1 Dashboard

After opening your learner's E-portfolio, you will see their **Dashboard** which provides an overview of their progress.




The **supervised learning event** section of your learner's dashboard displays the following information:

- Count of each supervised learning event type that has been started (orange)
- Count of each supervised learning event type that has been completed (green)

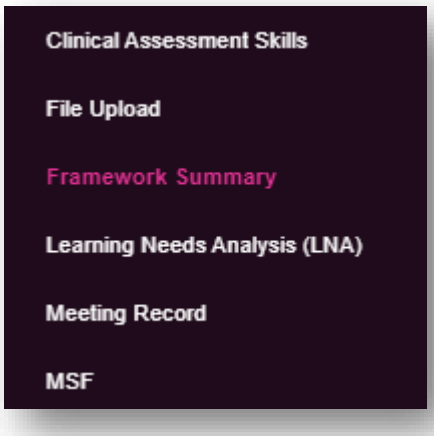
Hovering over the numbers provide you with an explanation as to what this relates to.

You can access any forms directly from the dashboard by clicking on the relevant evidence type. For the example above, if you click anywhere on the row which contains 'Reflective Account (RA)' you can access your learner's Reflective Accounts.

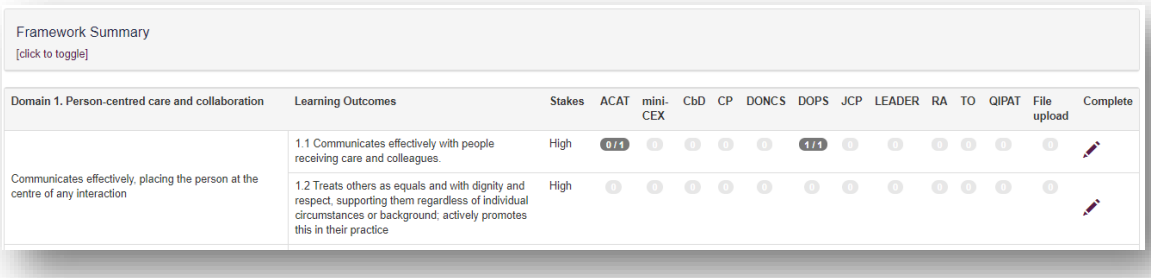
More information about accessing Supervised Learning Events can be found in **Section 8.**

## 4.2 Framework summary

You can view your learner's overall progress against the curriculum outcomes by selecting "**Framework Summary**" from the navigation menu.

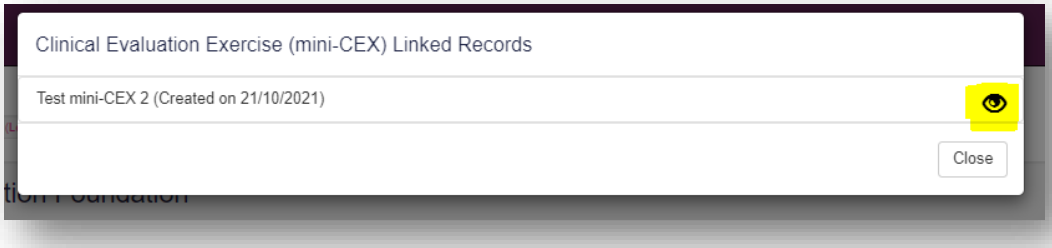



The framework summary displays a count of all records (supervised learning outcomes **and** file uploads) that have been mapped to the outcomes. When records are mapped, a number appears in a grey circle. The number on the right indicates evidence which has been started and the number on the left indicates evidence which your learner has marked as complete.

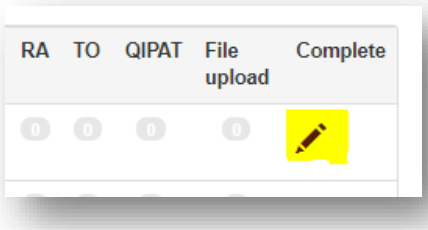



| Domain 1. Person-centred care and collaboration | Learning Outcomes | Stakes | ACAT | mini-CEX | CbD | CP | DONCS | DOPS | JCP | LEADER | RA | TO | QIPAT | File upload | Complete |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Communicates effectively, placing the person at the centre of any interaction | 1.1 Communicates effectively with people receiving care and colleagues. | High | 0 / 1 | 0 | 0 | 0 | 0 | 1 / 1 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | 1.2 Treats others as equals and with dignity and respect, supporting them regardless of individual circumstances or background; actively promotes this in their practice | High | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |

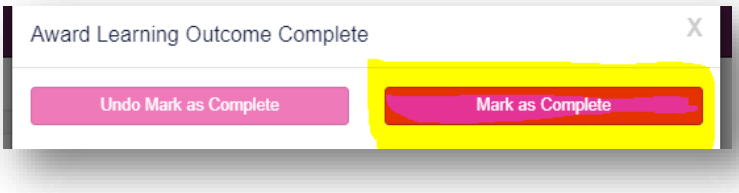
You can access the mapped online record direct from the framework summary by clicking on the grey circle and then the eye icon.



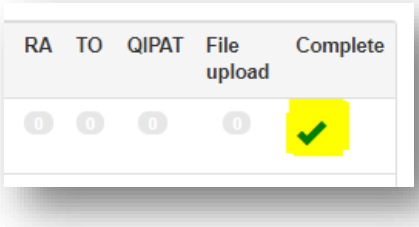

When your learner feels they have enough evidence mapped to an outcome to demonstrate they are performing at the required level, they can mark the outcome as complete. This can be used to help prioritise learning and development. We recommend they discuss with you if they are ready to mark any outcomes as complete.




Clicking on the pencil opens a box where your learner has the option to mark the outcome as complete.

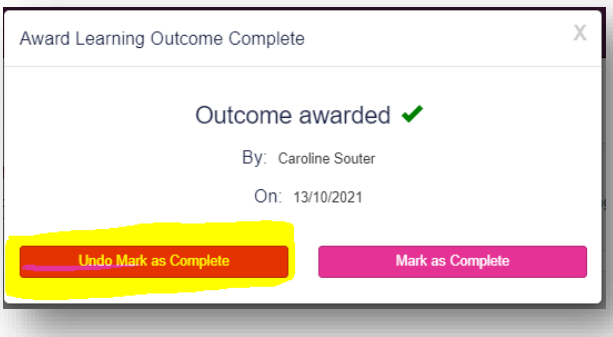



When your learner selects "**Mark as Complete**" the pencil changes to a green tick.




**NOTE:** the curriculum recommends a minimum of three pieces of evidence of low stakes outcomes, with more pieces for higher stakes' outcomes.

If you or your learner decide the outcome hasn't actually been met, your learner can click the green tick which gives them the option to undo marking it as complete.



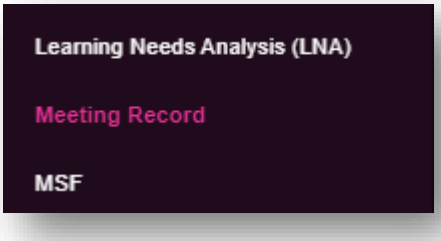

# 5 Review meetings

The E-portfolio includes two different tools to record discussion with your learner during your training programme:

- Meeting record – for informal regular review meetings (see section 5.1)
- Intermediate progress reviews – more formal progress reviews (section 5.2)

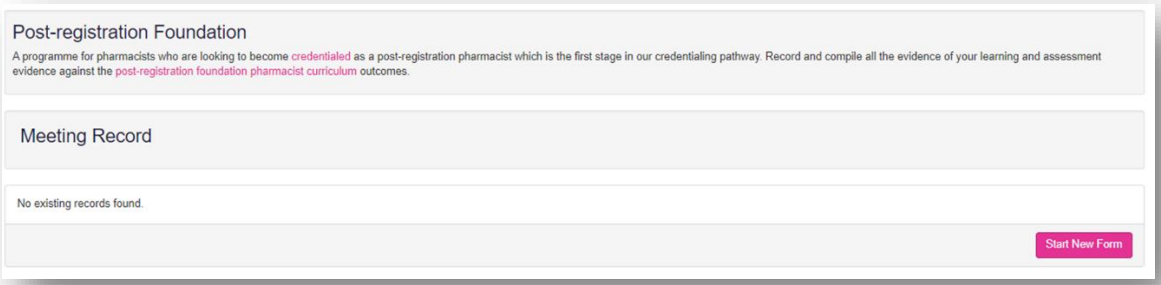
## 5.1 Meeting record

It is important to capture discussions of meetings that you have with your learner and this can be done using the "**Meeting Record"** form in the E-portfolio.

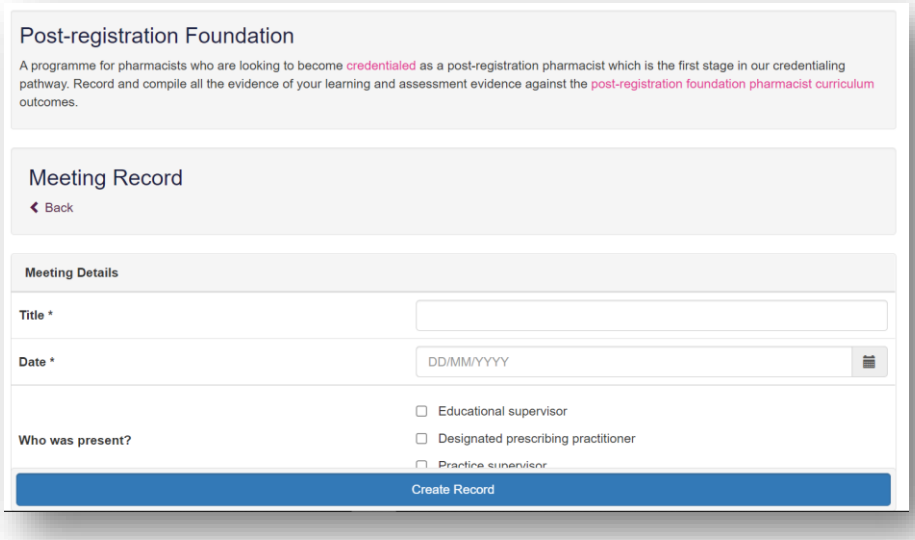



These forms should be completed by your learner but have been built to allow both the learner and their educational supervisor/designated prescribing practitioner to add comments.

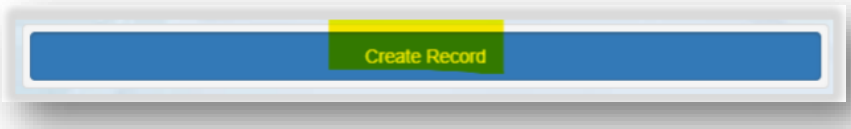
If you wish to create and complete a meeting record, select "**Start New Form**" from the meeting record summary page.




The ‘Meeting Record’ form will appear. Complete the required fields as instructed.

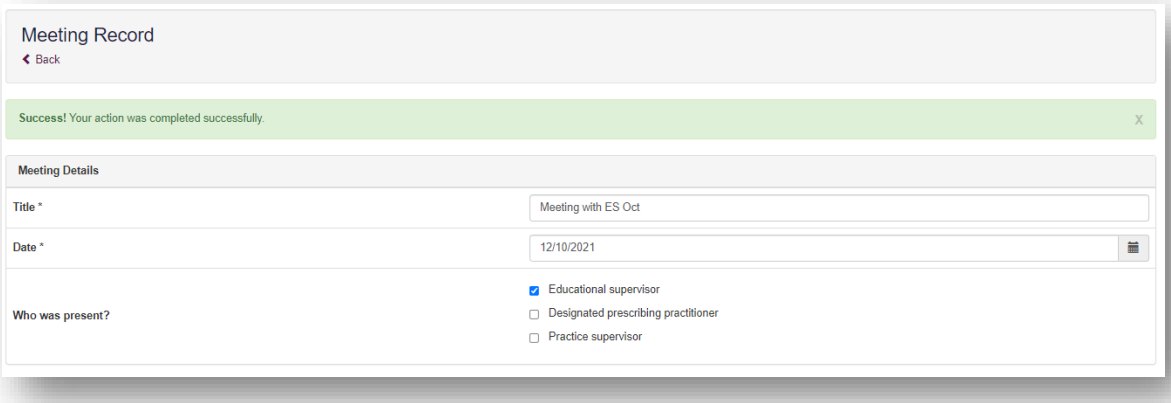



When you have completed all the required fields, select “**Create Record**”.

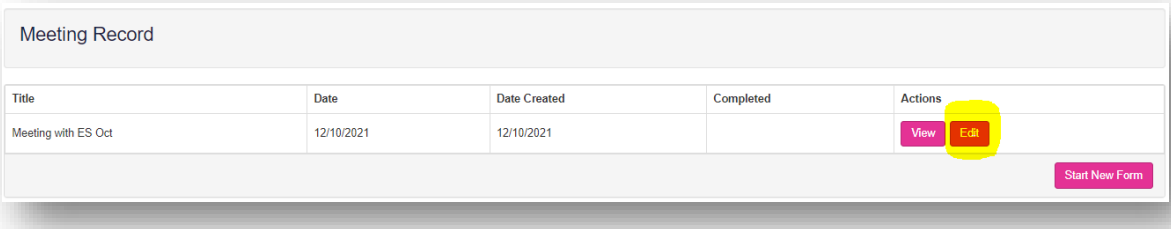



**NOTE:** You do not need to map meeting records to any assessment activities or learning outcomes; there is no section to map to the frameworks.

You will receive confirmation that the record has been saved and created.

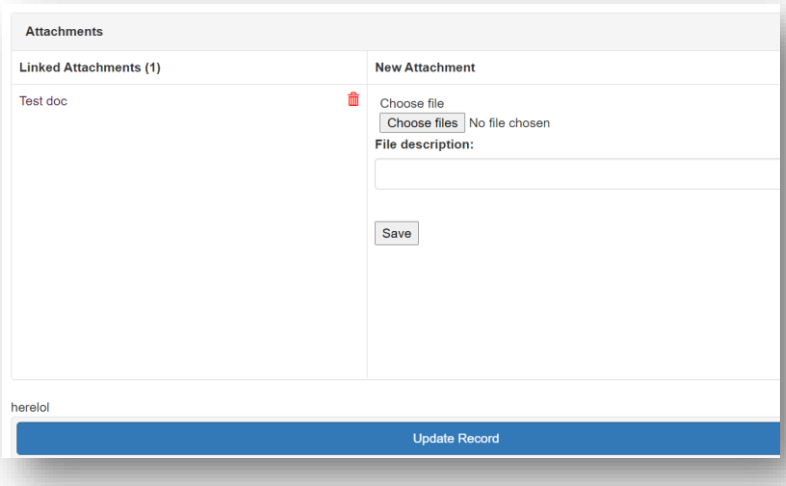



You will have noticed that you were not able to attach files when first completing the form. A file can only be attached when you have saved the meeting record by selecting "**Create Record"**. To upload an attachment as additional evidence for your meeting, select "**Edit**" to view the record you have just created and upload a file.

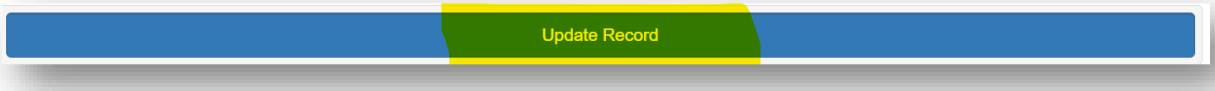



Add the upload by selecting "**Choose files**". You must enter a file description. Click "**Save**" once completed.

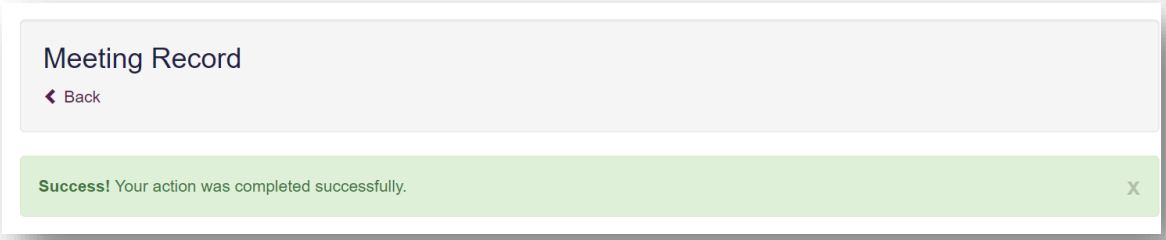
You can upload as many files as you wish, and delete any that are no longer relevant by clicking on the trash can icon.



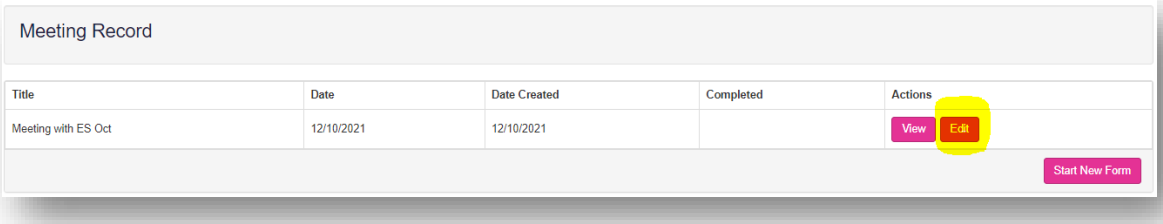

When you are finished editing select "**Update Record**".




You will receive confirmation that the record has been updated.




You can update the record by selecting "**Edit**" from the Meeting Record page.



## 5.2 Intermediate Progress Reviews (IPR)

The intermediate progress review is a more formal review than the informal reviews documented using the meeting record. As a minimum they should include the learner and their educational supervisor and/or designated prescribing practitioner but additional collaborators can be invited to participate in the review as appropriate.

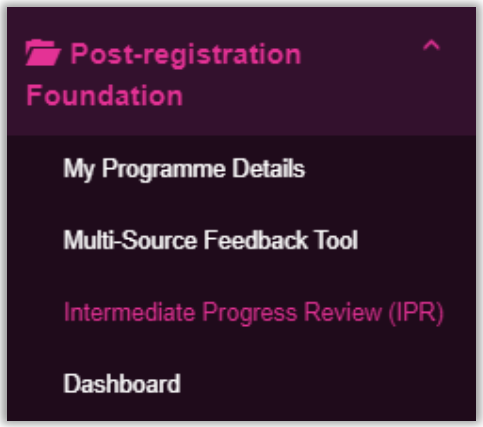
### 5.2.1 Initiating the Intermediate Progress Review

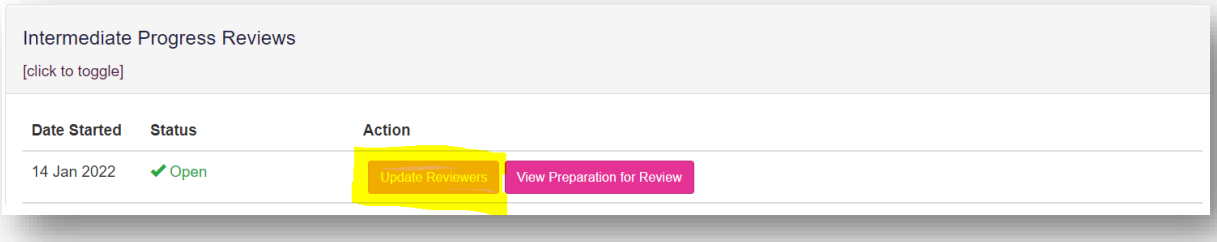
The tool allows the learner to invite any number of collaborators to participate in the review meeting and we recommend you consider if this would be appropriate. Examples of the types of roles who may attend some or all review meetings include, but are not limited to, a member of the academic team, an experienced external educational supervisor or a member of the training provider team.

The learner is also required to indicate who will be the 'Lead Reviewer'. This will be the person who is responsible for documenting the feedback and ratings agreed by the reviewers and marks each relevant section of the process as complete. The lead reviewer requires full (read/write) access to the learner's E-portfolio and will need to be either the educational supervisor or designated prescribing practitioner.

The learner will send invited collaborators a link which grants them read-only access to their E-portfolio so they can sample the learner's evidence and familiarise themselves with the areas of the E-portfolio that will be discussed during the review meeting.

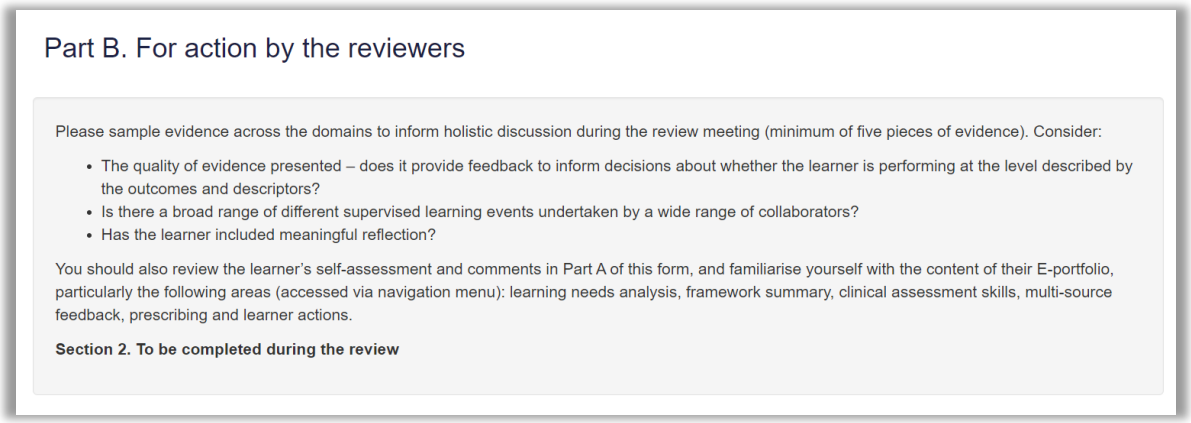
You can review the list of nominated colleagues by selecting "**Intermediate Progress Review (IPR)"** from the navigation menu, followed by selecting the "**Update Reviewers**" button.



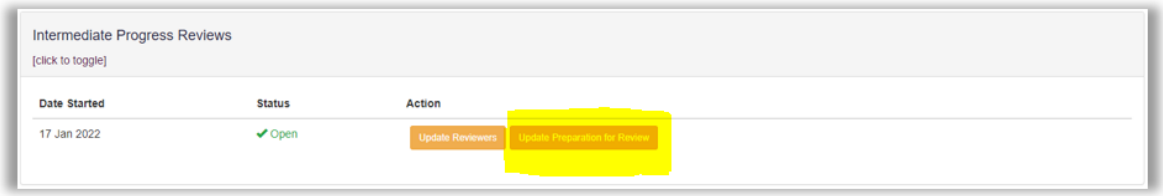



The learner will also populate Part A of the “Preparation for Review” form which includes a preparation checklist and various fields which prompts the learner to consider the period of training before the review and record how they feel they are getting on (combination of ratings and free comments).

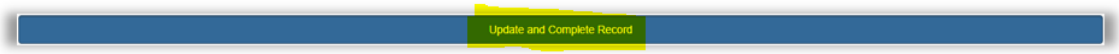
When they have completed this section, they should prompt you and any other nominated colleagues to read Part A. You should also read Part B of the “Preparation for Review” form which includes actions for the reviewers.



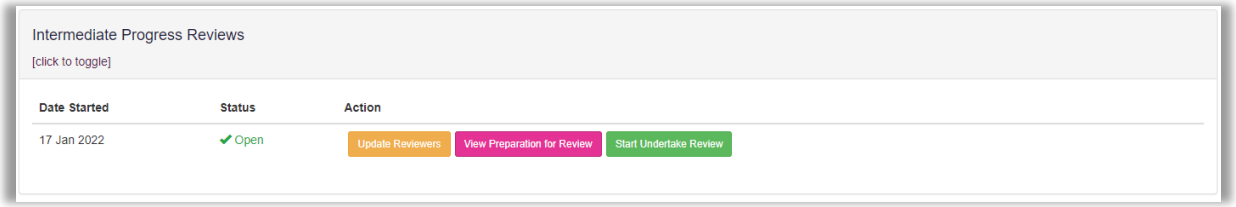

From the intermediate progress review summary page, select the “**Update Preparation for Review**” button.




Review the answers that your learner has provided for the questions in the form – if you do not require any amendments, click the “**Update and Complete Record**” button at the bottom of the page.

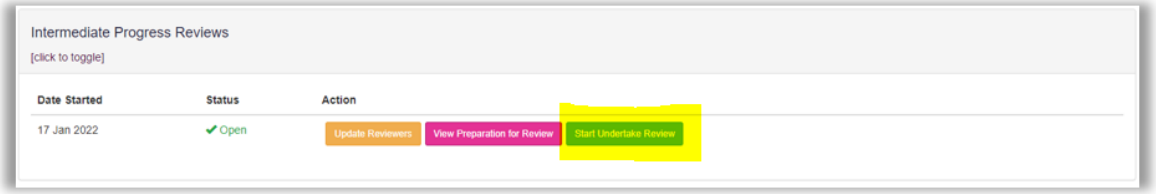



Once this record is completed, navigate back to the intermediate progress review summary page, and a new “Start Undertake Review” button will appear.




### 5.2.2 Undertaking the Intermediate Progress Review meeting

During your planned intermediate progress review meeting, you should click the “**Start Undertake Review**” button to access the meeting form.




**NOTE:** You are required to fill in the form during your meeting by populating all required fields within the form with a review of your learners’ practice. Please save the form as you go; if inactive for a period of 35 minutes, you will be automatically logged out of the E-portfolio. Any fields which include the asterisk symbol (*) are mandatory and will need to have ‘dummy’ text in to enable you to save the form as you go.

## Section 2: Undertake Review

[click to toggle]
Back

**Date of intermediate progress review** *

DD/MM/YYYY

| Quality of evidence | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the quality of evidence sampled * | ○ | ○ | ○ | ○ | ○ |

**Please comment on the quality and range of evidence presented by the learner** *

**Is there sufficient variety in the collaborators completing supervised learning events?** *
*If tick 'no' – please provide comments*
○ Yes
○ No

**Comments**

**Has the learner included meaningful reflection in their evidence?** *
*If tick 'no' – please provide comments*
○ Yes
○ No

**Comments**

**How can the learner improve the quality of their evidence before the next review?** *

| Learning experiences | Strongly disagree | Disagree | Neutral | Agree | Strongly agree |
|---|---|---|---|---|---|
| The learner has had sufficient learning experiences for the prescribing (clinical) capabilities? * | ○ | ○ | ○ | ○ | ○ |
| The learner has had sufficient learning experiences for the non-clinical capabilities? * | ○ | ○ | ○ | ○ | ○ |

**Are there are any concerns about the learner being exposed to sufficient learning experiences to meet the curriculum outcomes?**
*If tick 'yes' – please provide comments*
○ Yes
○ No

**Comments**

**If there are any learning experiences that would be beneficial to the learner before their next review, please include**

| Curriculum outcomes<br>*Click on 'Framework Summary' in the navigation menu to view* | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the learner's progress with the curriculum outcomes across the different domains, for their stage of training * | ○ | ○ | ○ | ○ | ○ |

**Are there are any concerns about the learner's progress with the outcomes?** *
*If tick 'yes' – please provide comments*
○ Yes
○ No

**Comments**

| Core clinical assessment skills<br>*Click on 'Clinical Assessment Skills' in the navigation menu to view* | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the learner's progress with their core clinical assessment skills, for their stage of training * | ○ | ○ | ○ | ○ | ○ |

**Are there any concerns about the learner's progress with the clinical assessment skills?** *
*If tick 'yes' – please provide comments*
○ Yes
○ No

**Comments**

## Section 2: Undertake Review

[click to toggle]

Back

**Date of intermediate progress review** *

DD/MM/YYYY

| Quality of evidence | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the quality of evidence sampled * | ○ | ○ | ○ | ○ | ○ |

**Please comment on the quality and range of evidence presented by the learner** *

**Is there sufficient variety in the collaborators completing supervised learning events?** *
*If tick 'no' – please provide comments*
○ Yes
○ No

**Comments**

**Has the learner included meaningful reflection in their evidence?** *
*If tick 'no' – please provide comments*
○ Yes
○ No

**Comments**

**How can the learner improve the quality of their evidence before the next review?** *

| Learning experiences | Strongly disagree | Disagree | Neutral | Agree | Strongly agree |
|---|---|---|---|---|---|
| The learner has had sufficient learning experiences for the prescribing (clinical) capabilities? * | ○ | ○ | ○ | ○ | ○ |
| The learner has had sufficient learning experiences for the non-clinical capabilities? * | ○ | ○ | ○ | ○ | ○ |

**Are there are any concerns about the learner being exposed to sufficient learning experiences to meet the curriculum outcomes?**
*If tick 'yes' – please provide comments*
○ Yes
○ No

**Comments**

**If there are any learning experiences that would be beneficial to the learner before their next review, please include**

| Curriculum outcomes<br>*Click on 'Framework Summary' in the navigation menu to view* | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the learner's progress with the curriculum outcomes across the different domains, for their stage of training * | ○ | ○ | ○ | ○ | ○ |

**Are there are any concerns about the learner's progress with the outcomes?** *
*If tick 'yes' – please provide comments*
○ Yes
○ No

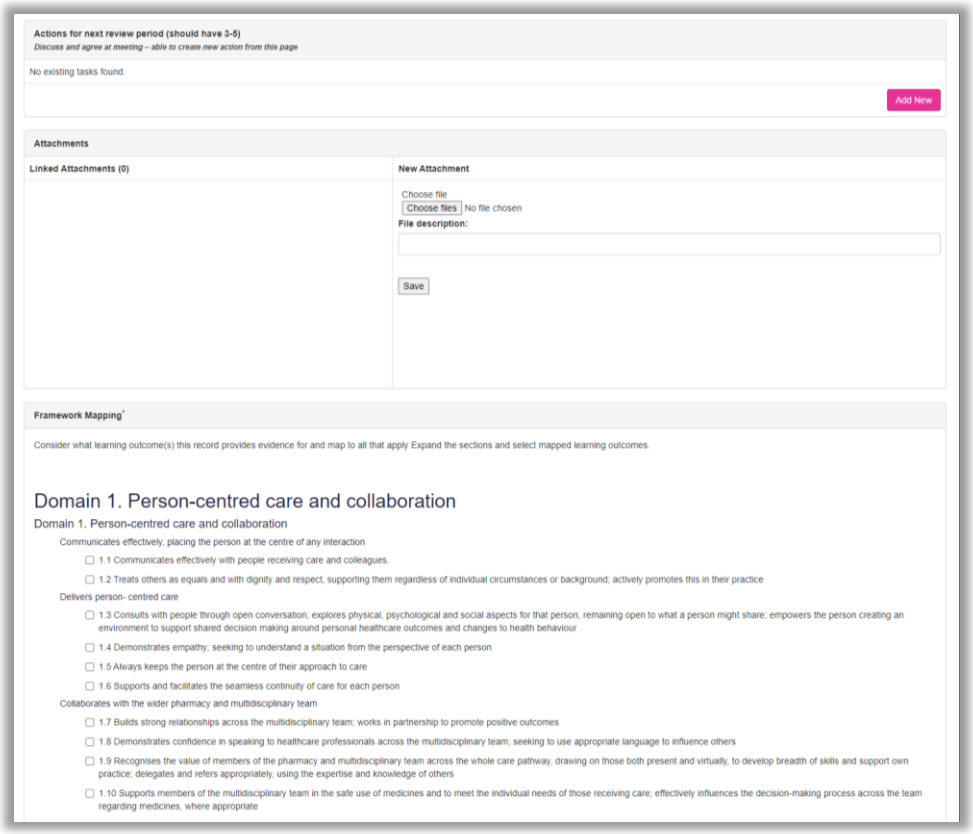
**Comments**

| Core clinical assessment skills<br>*Click on 'Clinical Assessment Skills' in the navigation menu to view* | Poor | Fair | Good | Very good | Excellent |
|---|---|---|---|---|---|
| Please rate the learner's progress with their core clinical assessment skills, for their stage of training * | ○ | ○ | ○ | ○ | ○ |

**Are there any concerns about the learner's progress with the clinical assessment skills?** *
*If tick 'yes' – please provide comments*
○ Yes
○ No

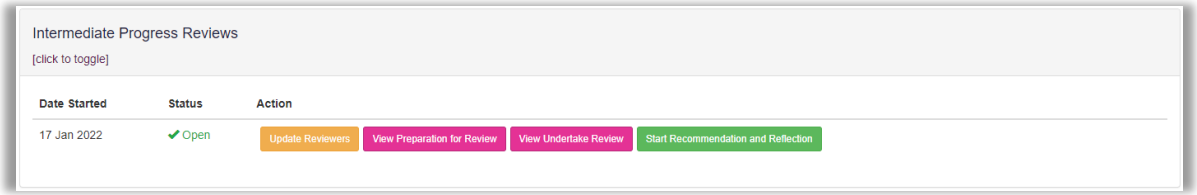
**Comments**

As with other forms, you can also add actions, attachments, and mapping against the learning outcomes at the bottom of this form.



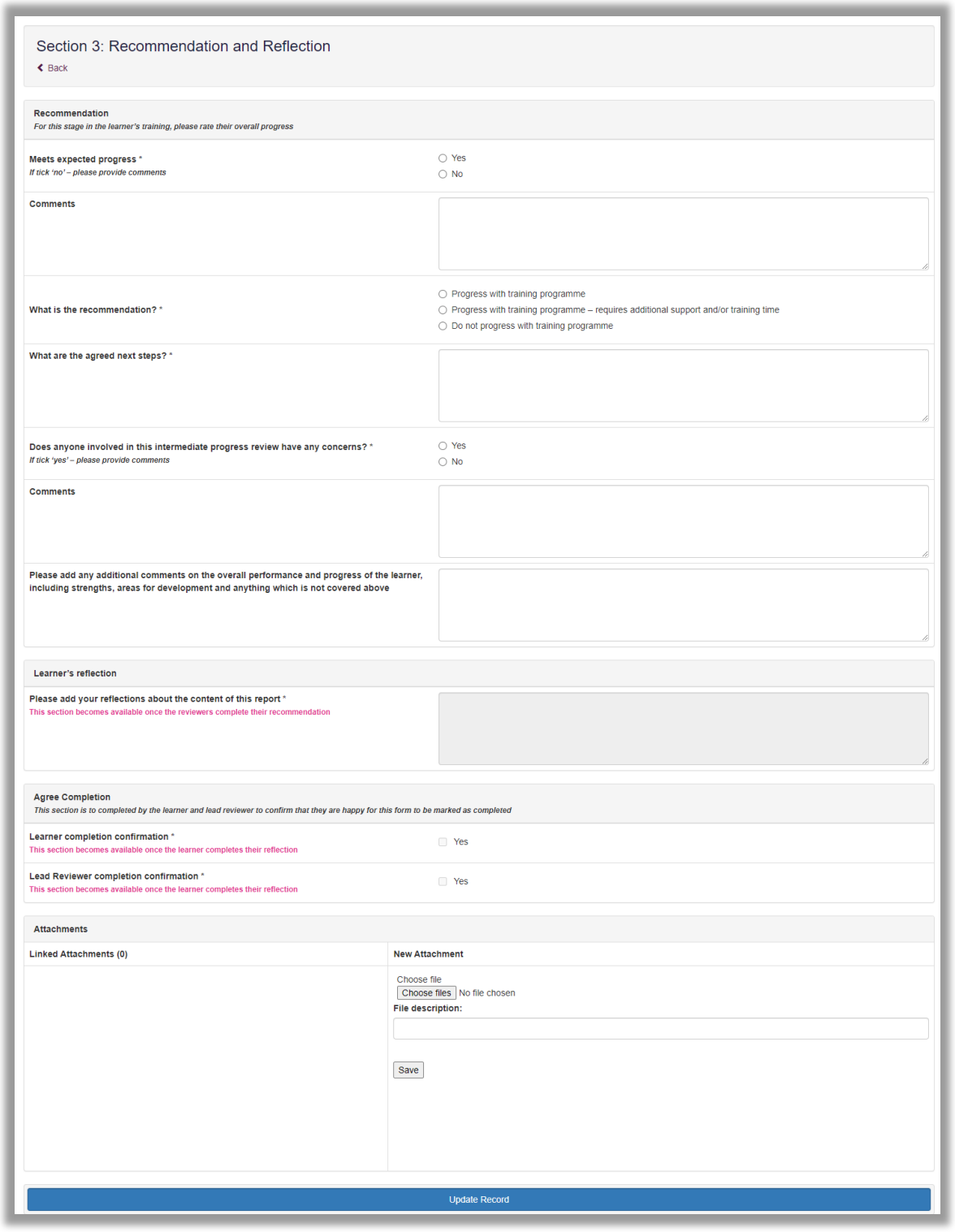

Once you have populated all required fields within the form and saved your changes, click the "**Update and Complete Record**" button at the bottom of the page.

Once this record is completed, navigate back to the intermediate progress review summary page, and a new "Start Recommendation and Reflection" button will appear.



### 5.2.3 Recommendation and Reflection

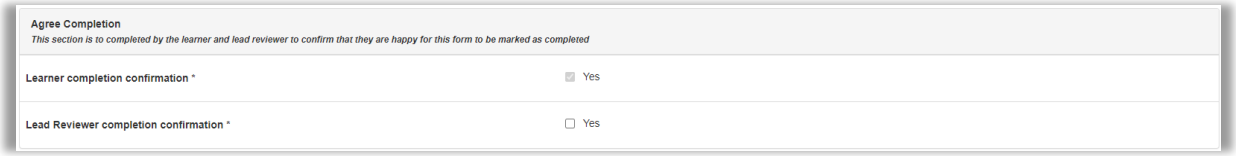
Click this button to be taken to the "**Recommendation and Reflection**" form, which will allow you to provide an overall rating for your learner's progress and make a recommendation about their progressing with their training programme. Complete all the required fields on the form and save your changes.



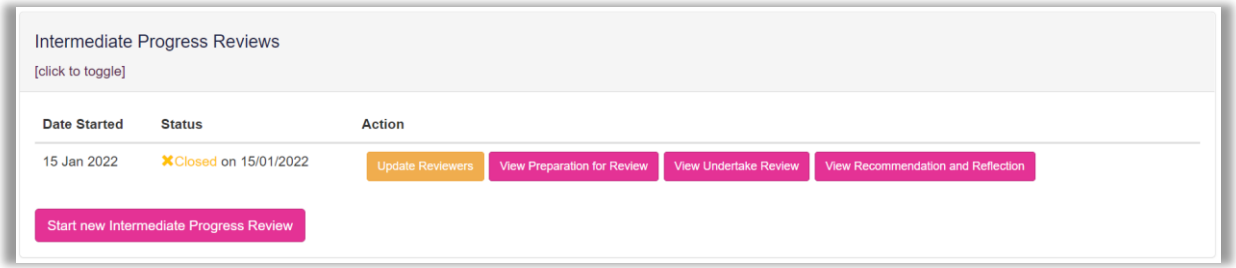
Once you have populated all required fields within the form and saved your changes, click the “**Update and Complete Record**” button at the bottom of the page.

At this point your learner is required to access the form, and provide their own reflections on the intermediate progress review process, and mark the “**Learner completion confirmation**” checkbox.

Once they have completed this, you can navigate back to the form (as before), and you will be able to confirm that you also agree the process is complete, by marking the “**Lead Reviewer completion confirmation**” checkbox.




Once you and your learner have both confirmed that the process is complete, the intermediate progress review is complete and the summary page will be updated so that you can view all the feedback provided throughout the process, or initiate a new intermediate progress review cycle.



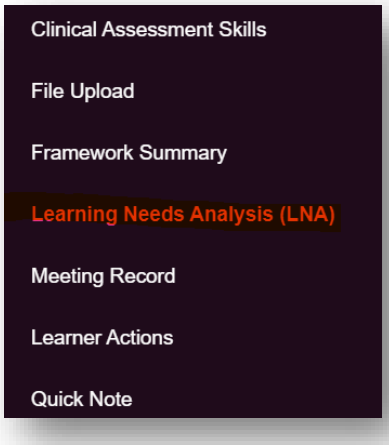
# 6 Identifying your learner's development needs

The Learning Needs Analysis (LNA) tool enables you and your learner to identify and prioritise their learning needs by assessing their practice against the post-registration foundation pharmacist curriculum outcomes. We recommend learners complete a Learning Needs Analysis at the start of their training and before every intermediate progress review or when their practice changes significantly, such as a change in role or change in responsibilities. If you are supervising a learner within a formal training programme, we suggest checking the requirements with the training provider; they may require learners to complete a Learning Needs Analysis more frequently.

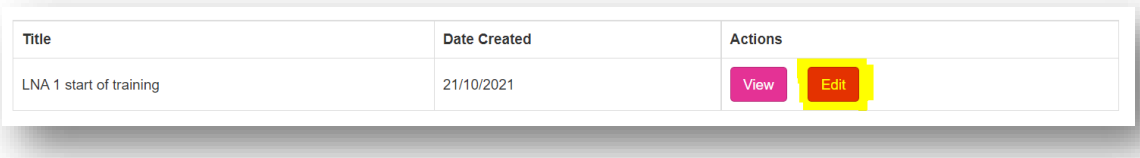
Your learner will work through the Learning Needs Analysis tool and assess themselves against the outcomes, considering their **current ability** and the **priority** for their practice at that point in time. The current ability and priority ratings are **High, Medium** or **Low**. For an explanation of the different ratings see **section 6.2**.

## 6.1 Reviewing a Learning Needs Analysis

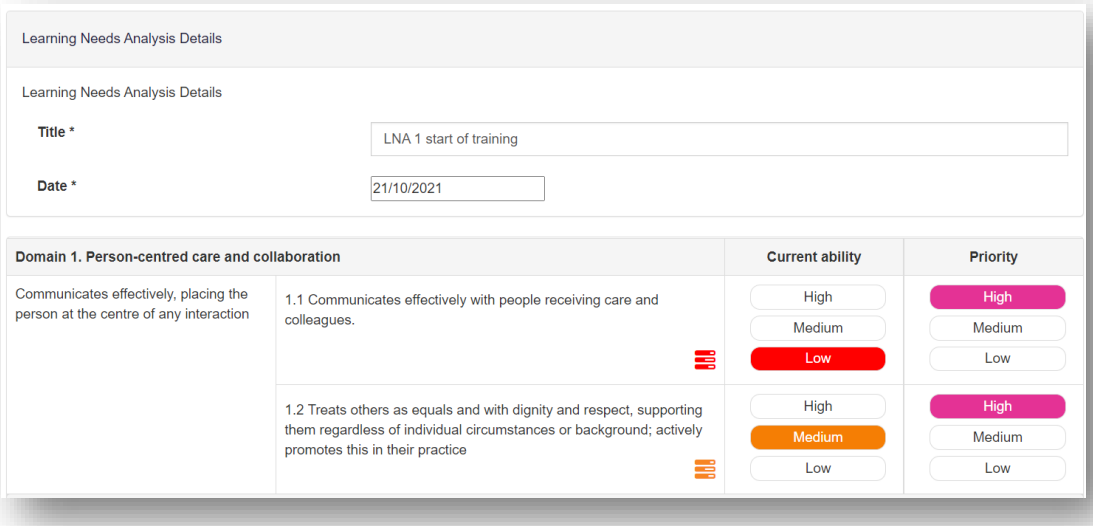
To review a Learning Needs Analysis, select the "**Learning Needs Analysis**" option from the navigation menu.



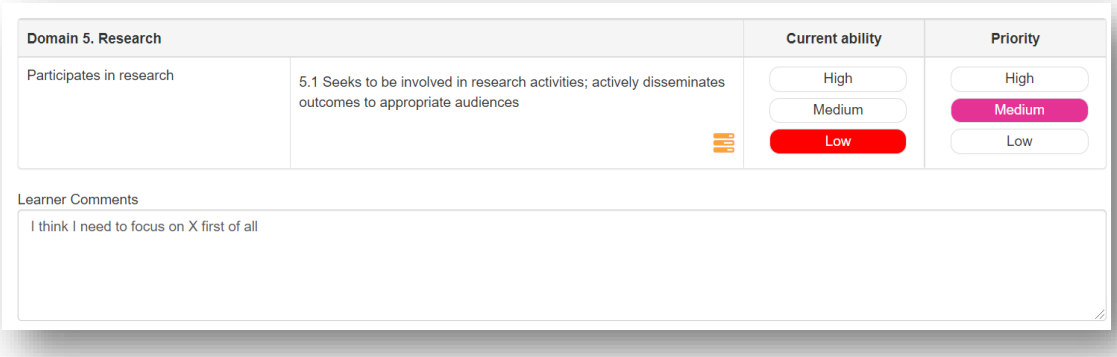

Select "**Edit**" next to the Learning Needs Analysis you would like to review.




The Learning Needs Analysis will appear.



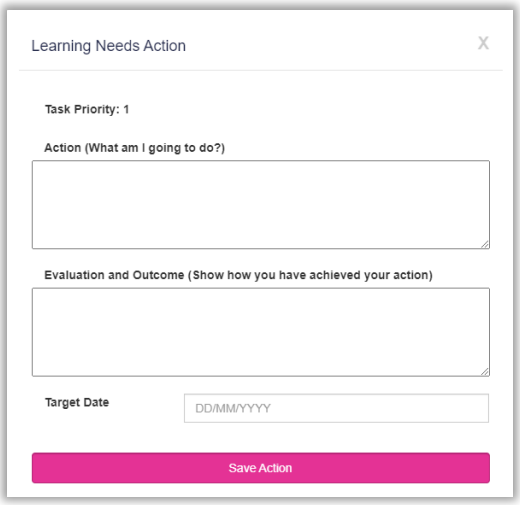

You can review how your learner has rated their current ability and the priority for each outcome, and any comments they have added at the end of the form.



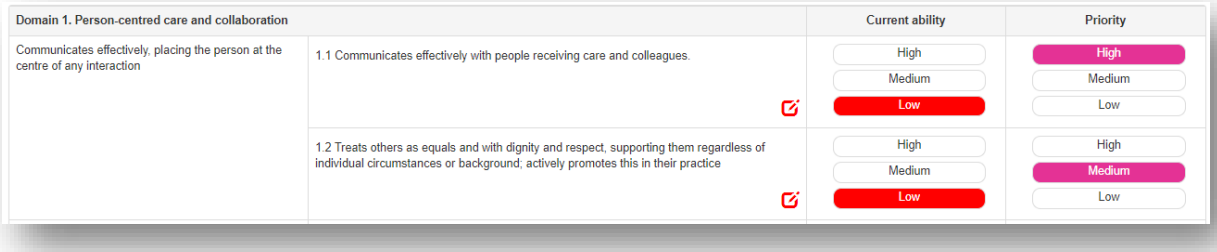

You will see that for certain ratings, icons appear next to each outcome.

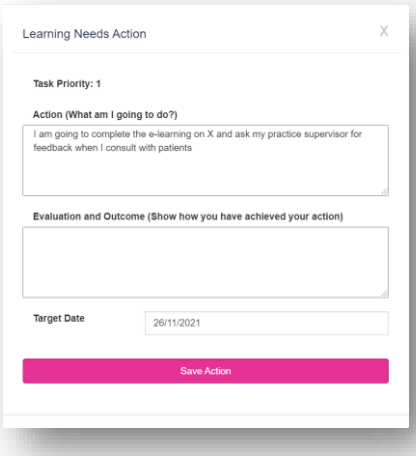
Outcomes that require further development are highlighted by an ***action prompt*** icon

When your learner clicks on the action prompt, they have the option to create an action.

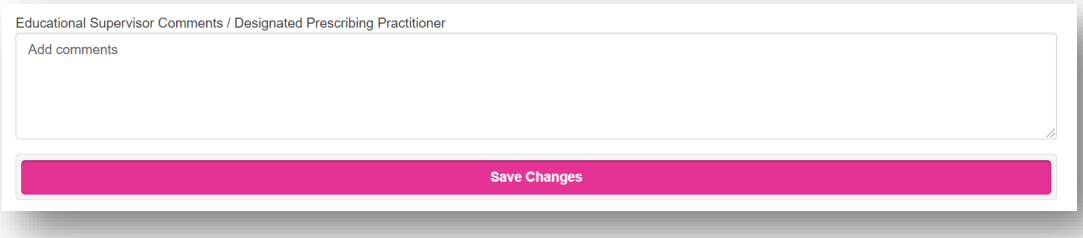



An action icon represents an action created by your learner. To view the details simply click on the icon.



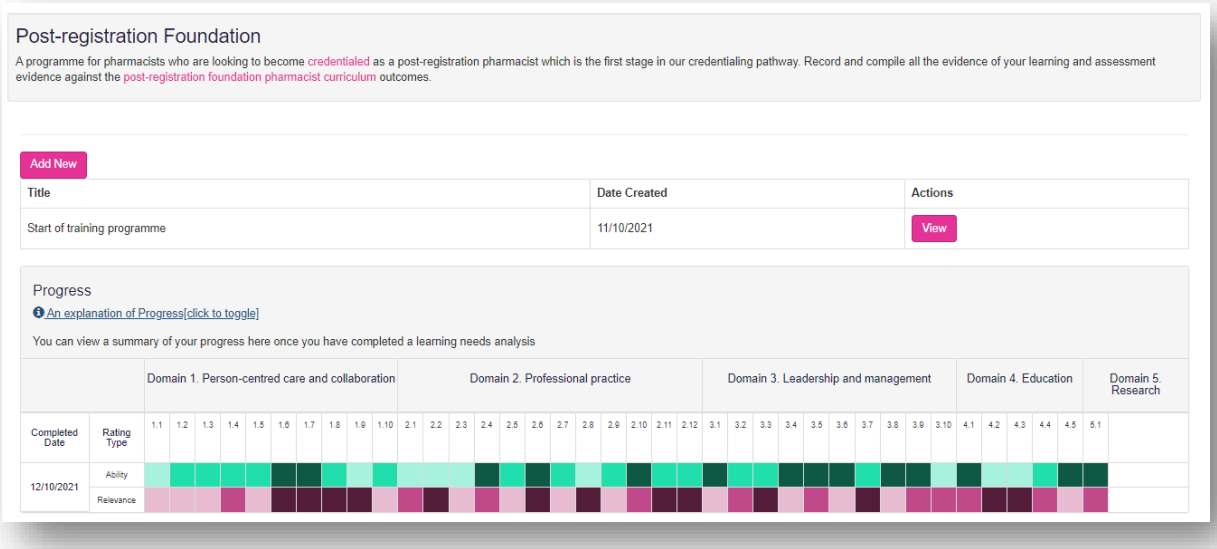

At the end of the Learning Needs Analysis form, you are able to add some comments.




When all of the outcomes have been rated and you have added any comments, you or your learner can mark the Learning Needs Analysis as complete by clicking "**Mark as Complete**". After this point, the Learning Needs Analysis will be closed and cannot be edited any further.

**NOTE:** All mandatory fields of the Learning Needs Analysis need to be completed for the record to be marked as complete.

When the Learning Needs Analysis has been marked as complete, the heat map will appear in the summary page which provides a visual summary of your learner's progress.




## 6.2 Learning Needs Analysis ratings and icons

The ratings and icons for the Learning Needs Analysis are outlined below:

**Current ability**

| Rating | Explanation |
|---|---|
| **High** | I have evidence to show I have the knowledge, skill, behaviour or experience needed to consistently demonstrate this outcome at the required level. |
| **Medium** | I have this knowledge, skill, behaviour or experience but have not had the opportunity to fully demonstrate this outcome at the required level. |
| **Low** | I don't have the knowledge, skill, behaviour or experience to demonstrate this outcome yet. |

**Priority**

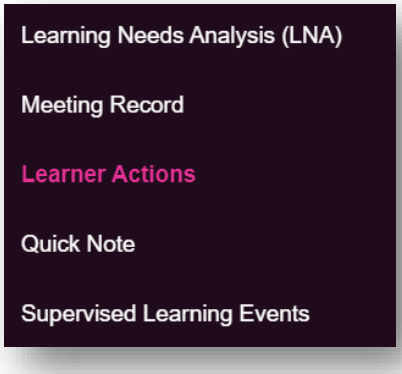
| Rating | Explanation |
|---|---|
| **High** | This is high priority for my practice at this time. |
| **Medium** | This is medium priority for my practice at this time. |
| **Low** | This is low priority for my practice at this time. |

The following table summarises the icons that you might see in the learning needs analysis tool. The action column describes the action you can take if you click on the icon within the learning needs analysis.

| Icon | Description | Action (when icon is clicked) |
|---|---|---|
| | Low ability – High priority rating action prompt (Priority 1 **action**) | Create action |
| | Medium ability – High priority rating action prompt (Priority 2 **action**) | Create action |
| | Low ability – Highest priority rating action (Priority 1 **task**) | View and edit action |
| | Medium ability – High priority rating action (Priority 2 **task**) | View and edit action |
| | Low ability – Medium priority rating action (Priority 3 **task**) | View and edit action |
| | Action completed | View action |

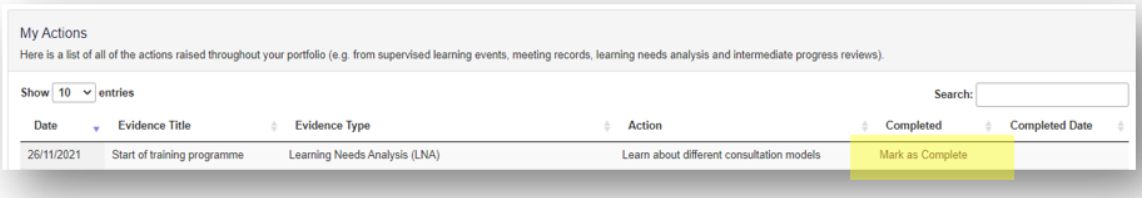
## 6.3 Reviewing actions from the Learning Needs Analysis

Your learner's actions are saved under the **Learner Actions** area of the E-portfolio which can be accessed from the navigation menu.

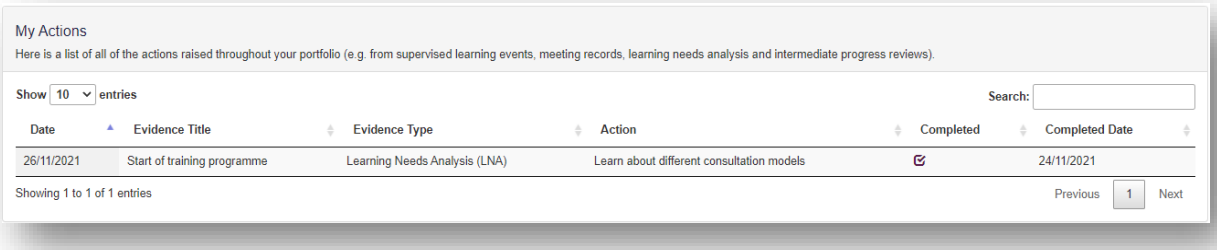



This opens up a list of all the actions raised throughout your learner's E-portfolio (for example from supervised learning events, meeting records, learning needs analysis etc.).

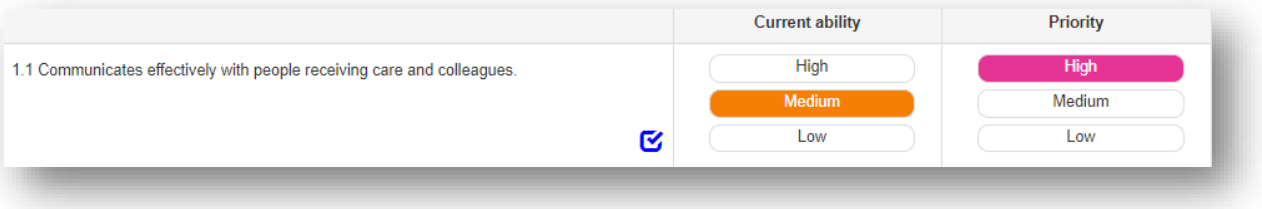
When your learner has completed an action, they are able to mark it as complete.




Completed actions will display the following icon




Within the **Learning Needs Analysis** area**,** the action icon for the completed task will change to a blue icon.




# 7 Completing assessment tools and forms

As your learner works through their E-portfolio they will create and complete various online assessment tools and forms. These will become records of their learning and development throughout their post-registration foundation E-portfolio. Please refer to **Section 3.4.3** for a full list of the E-portfolio assessment tools and forms and their associated permissions.

There are two main ways of completing an online assessment tool or form:

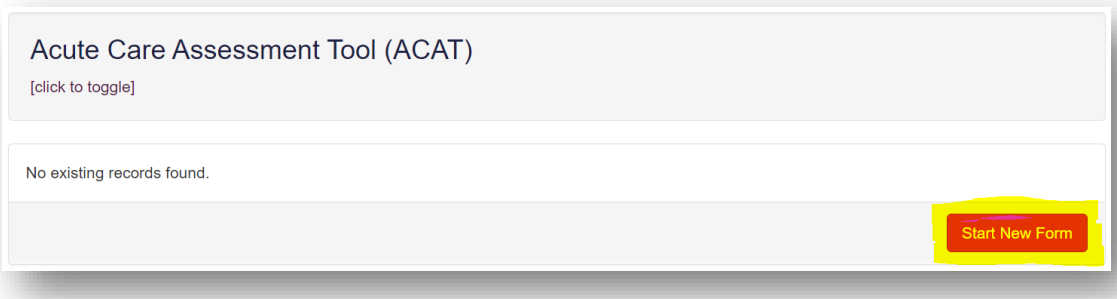
- Online process with **portfolio collaborator** (educational supervisors and designated prescribing practitioners)
- Online process with a **ticketed collaborator** (colleagues from pharmacy/wider team)

We understand that there may be occasions where you and/or your learner may not have access to a computer, tablet or mobile device, or situations where connectivity is poor, therefore you also have the option to print off paper versions of all assessment tools and forms from the RPS website and upload these using the 'File Upload' tool. See **Section 10** for more details about this.

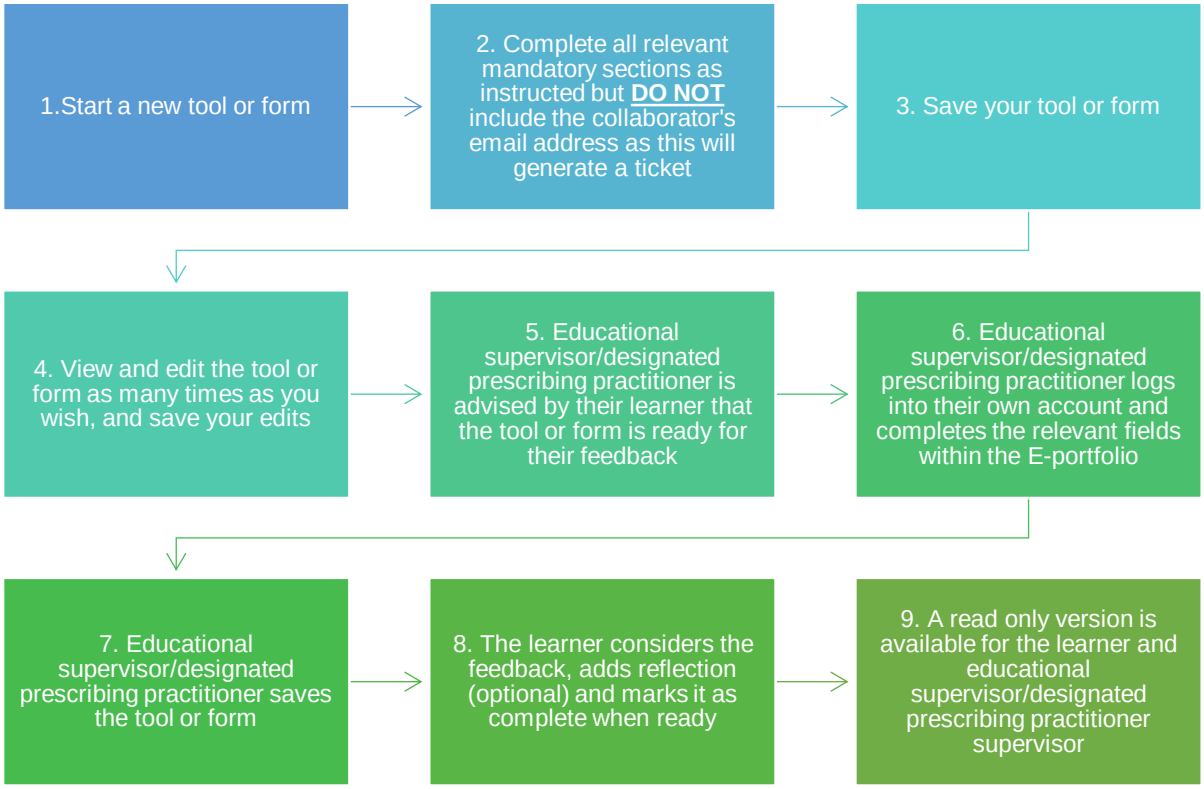
## 7.1 Online process with portfolio collaborator (educational supervisor or designated prescribing practitioner)

This process enables you to complete the forms directly within the E-portfolio as you have a registered E-portfolio account linked to your learner's.

When you open a tool or form, if you are given the option to '**Start New Form'** you can initiate the tool or form. This applies to supervised learning events and meeting records. Alternatively, your learner can initiate the form and then you complete the relevant fields.




The process is outlined below:



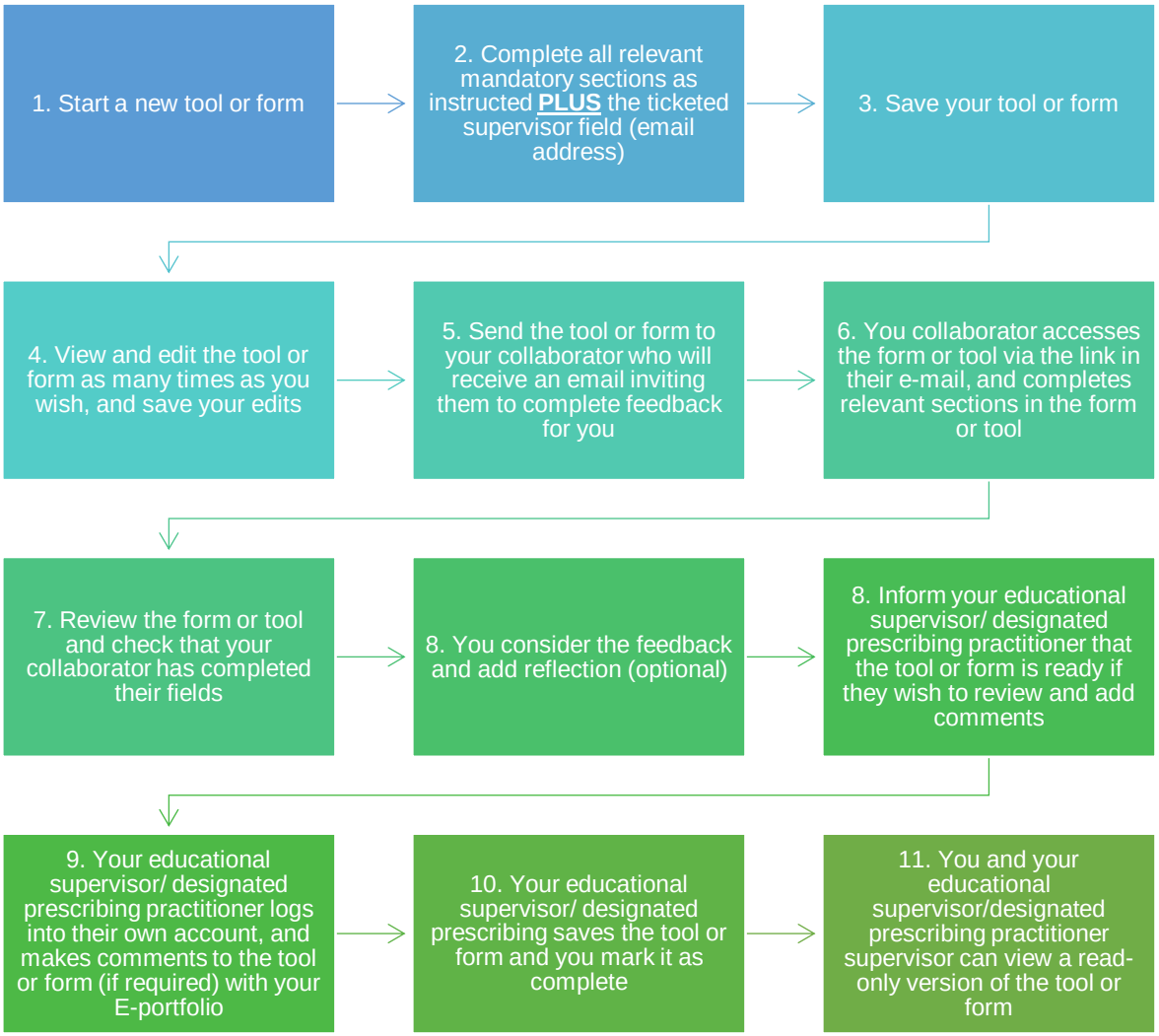

**NOTE:** if you have started a new tool or form, you can miss steps 5 and 6 and should inform your learner that it is ready for their input.

## 7.2 Online process with ticketed collaborator

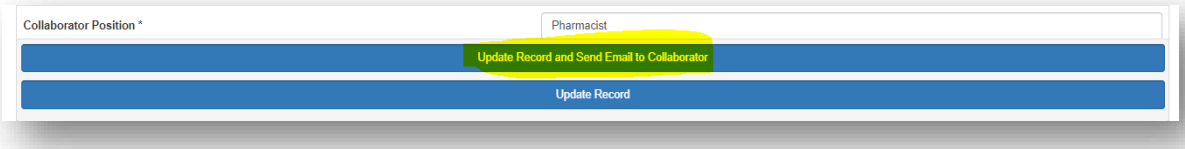
This process allows your learner to seek feedback from a collaborator, such as a practice supervisor, who does not have their own account within the E-portfolio. The process is known as a ticket, e-ticket, or e-ticketing.

**NOTE:** This process only provides collaborators 'one-time' access to complete a single assessment tool or form. If your learner would like a collaborator to provide feedback on more than one assessment tool or form, they will need to send them a ticket for each one.

The process for the **learner** is outlined below:

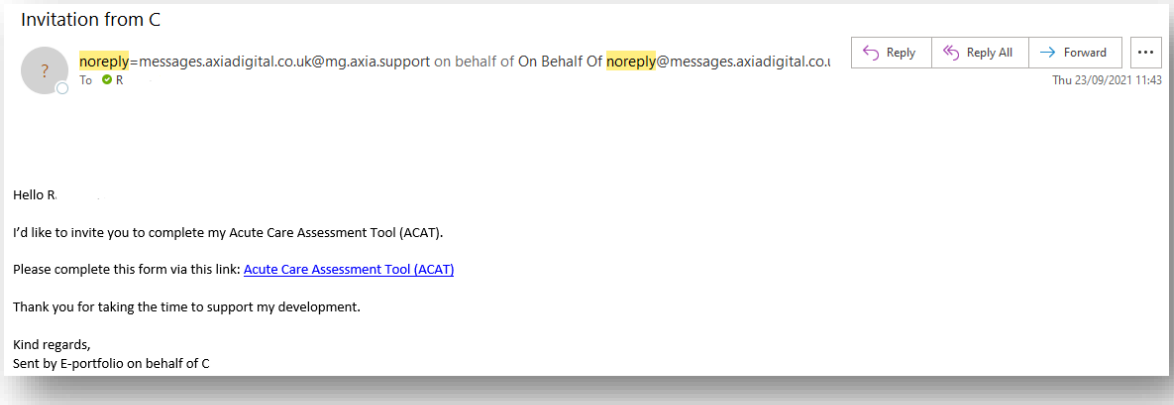



When your learner adds the ticketed collaborator's email address, it triggers the option to send the form via an email link.




The ticketed collaborator will receive an automated email from the E-portfolio; an example is shown below.

The learner should advise their ticketed collaborator to also check their junk folder as the automated emails can occasionally be filtered out as spam.




The ticketed collaborator will have 28 days to provide feedback with the e-ticketing process.

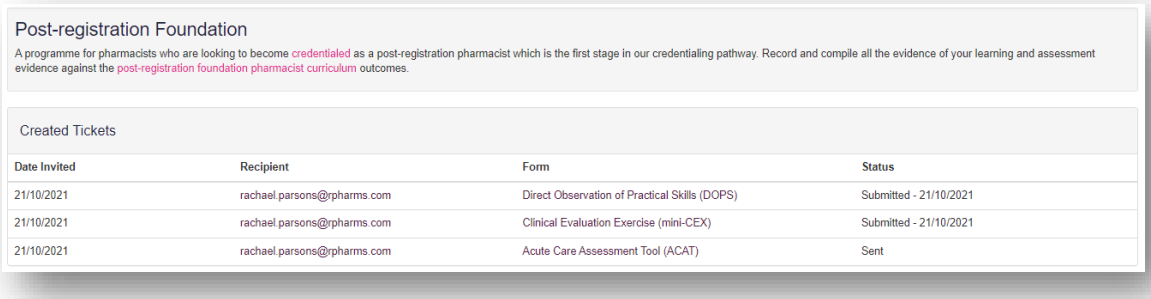
**NOTE**: The E-portfolio does not display details of when the invitation was sent, therefore your learner will need to log in on a regular basis and check whether their ticketed collaborator has provided feedback.

Your learner can re-send the collaborator a reminder if the email has not been received or has been deleted in error. If an incorrect email address has been entered, your learner can cancel the invitation, enter in the correct email, and send a new ticket invitation.

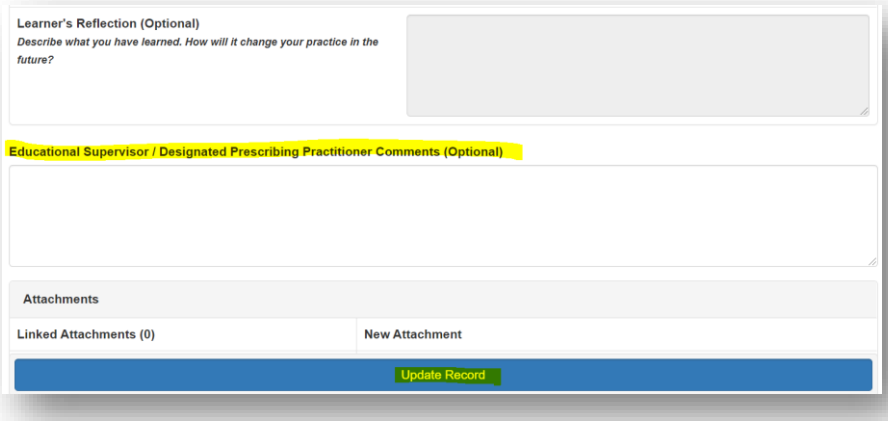
If the ticketed collaborator is not able to provide feedback, your learner has the option of sending the invitation to another ticketed collaborator. They will simply cancel the invitation and enter in the details for the alternative ticketed collaborator.

**NOTE**: If your learner cancels the invitation, the email to their original ticketed collaborator will no longer work and if they try to access the form or tool, they will receive a message informing them that they do not have access.

When your learner has sent a ticket it will appear in their list of created tickets at the top of the supervised learning event summary page. When the ticketed collaborator has completed the form, the status will change to submitted.




As the educational supervisor/designated prescribing practitioner, you are able to add comments to supervised learning event forms completed by ticketed collaborators. Clicking on the record in the 'Form' column of the 'Created Tickets' area takes you directly to the record. You can also access from the 'Supervised Learning Events' area if you scroll down the page and select the tool type. If you have added comments, remember to save them by clicking "**Update Record**".

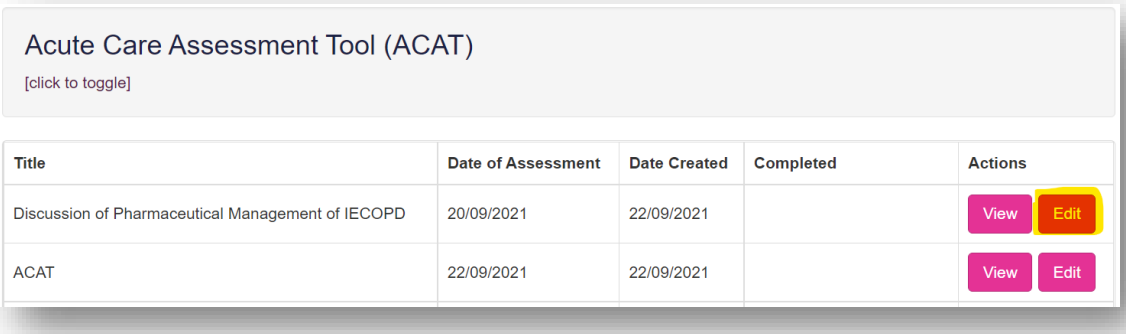



**NOTE:** If you would like to add comments to a form, this must be done before your learner marks it complete.

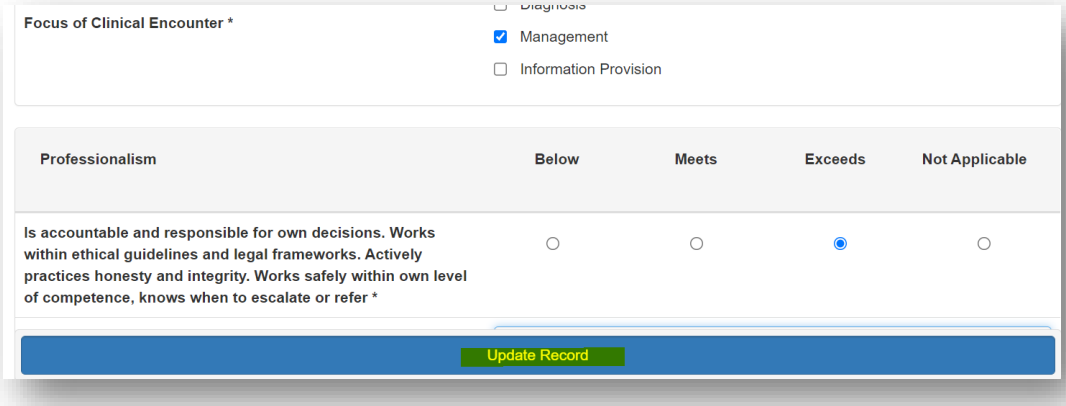
## 7.3 Editing and viewing tools and forms

You can edit any of the tools and forms by selecting "**Edit"** within the tool/form summary page.

You will be able to make edits until your learner marks the form as complete.

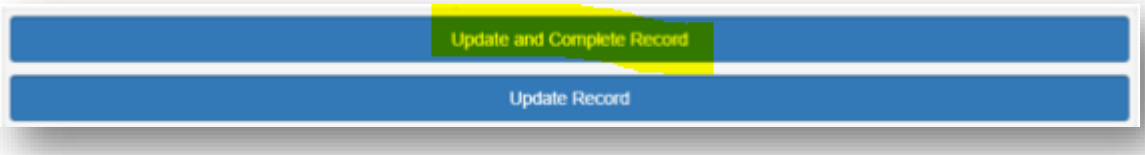



Remember to save any edits by selecting "**Update record**".

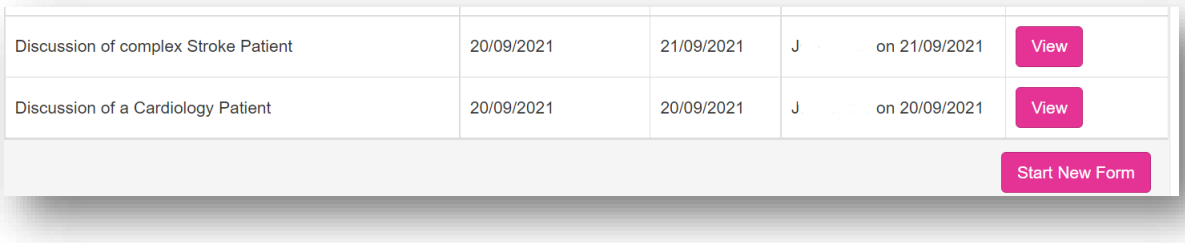



## 7.4 Marking tools and forms complete

When the tool or form doesn't require any further input, your learner is able to mark it as complete by selecting "**Update and Complete Record"**.

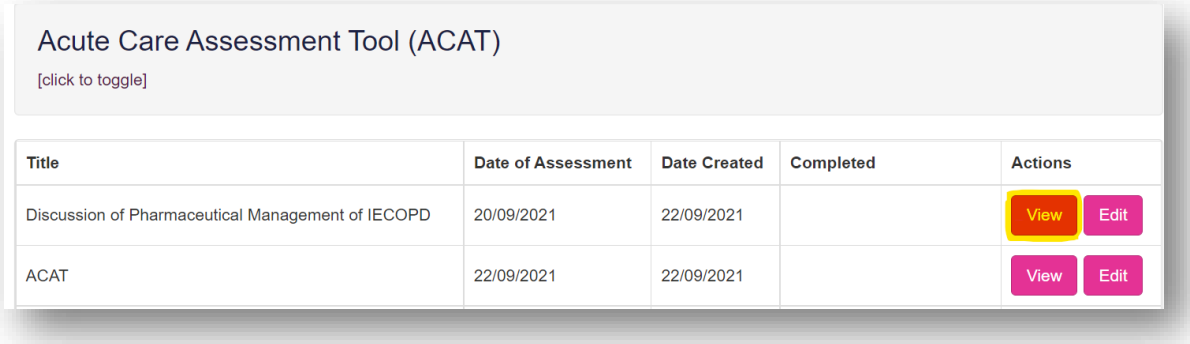



Once a tool or form is marked as complete it will only appear in **"View"** mode, and details of who it was signed off by (and the date it was signed off) will be populated in the 'Completed' column. **After the tool or form has been marked as complete it cannot be edited.**




Supervised learning events and file uploads that have been started or marked as complete will be included in the framework summary count for the outcomes they have mapped to (see section 4.2).

You can view any tools and forms by selecting **"View"** within the tool/ form summary page. This will display a read only version of the record.




**NOTE**: There is no functionality to delete records within the E-portfolio. If you create a record in error, you can edit and update the record to reflect another activity conducted in practice.

# 8 Assessment tools including supervised learning events

A range of assessment tools, including supervised learning events, are included in the E-portfolio to enable your learner to demonstrate their learning and competence against the outcomes and descriptors, and provide details of their reflections. The following tools are included in the RPS post-registration foundation E-portfolio:

**Supervised learning events**

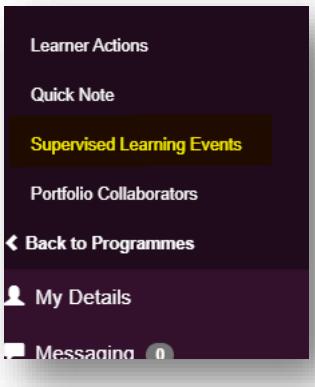
- Acute Care Assessment Tool (ACAT)
- Case Based Discussion (CbD)
- Case Presentation (CP)
- Clinical Evaluation Exercise (mini-CEX)
- Direct Observation of Non-Practical Skills (DONCS)
- Direct Observation of Practical Skills (DOPS)
- Journal Club Presentation (JCP)
- Leadership Assessment Skills (LEADER)
- Quality Improvement Project Assessment Tool (QIPAT)
- Teaching Observation (TO)

**Other tools**

- Reflective Account (RA)
- Patient Survey (PS) – *coming soon*
- Multi-Source Feedback tool (MSF) – *coming soon*

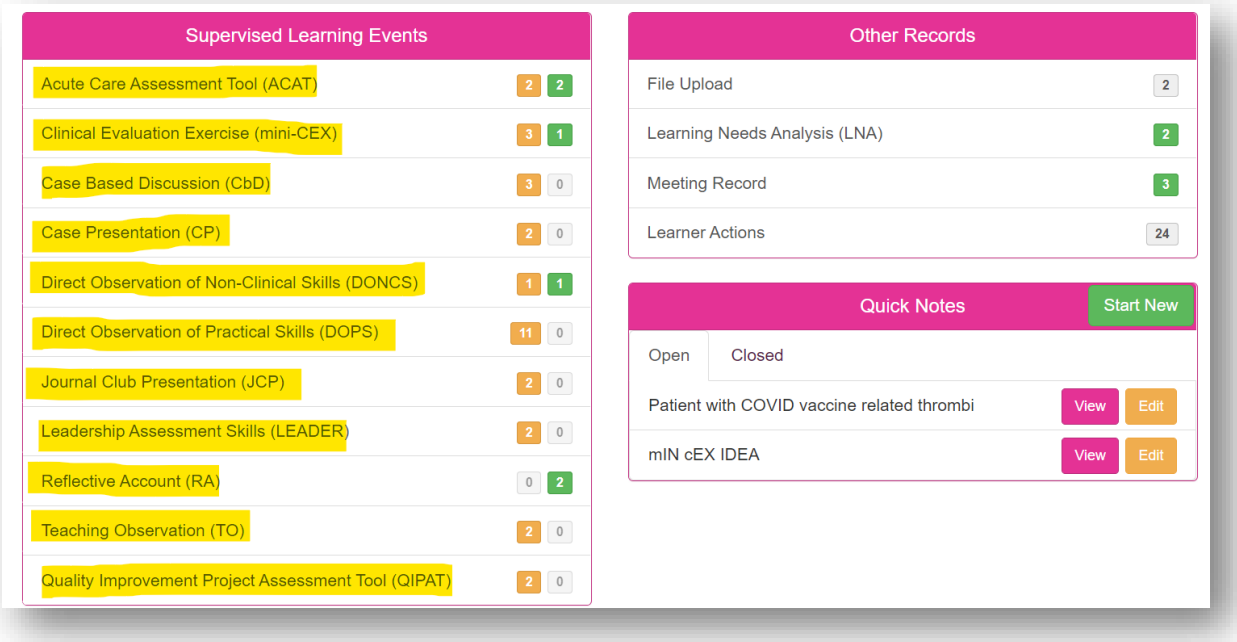
Your learner will complete these tools with a collaborator (either yourself as their educational supervisor and/or designated prescribing practitioner or a ticketed collaborator). They are a record of feedback provided to your learner on a learning event and allow them to demonstrate progress against the curriculum outcomes and clinical assessment skills. Your learner will either be directly observed in practice or will have a structured discussion with the collaborator about a clinical/non-clinical encounter they have been involved in. The collaborator will provide feedback on how well the learner demonstrated specific knowledge, skills, or attributes, and help to identify their learning and development needs.

Most of these tools can be accessed by selecting "**Supervised Learning Events"** from the navigation menu.




Supervised learning events can also be accessed from the dashboard.

Click on the tool you wish to access. You will then be directed to the summary page for that tool.



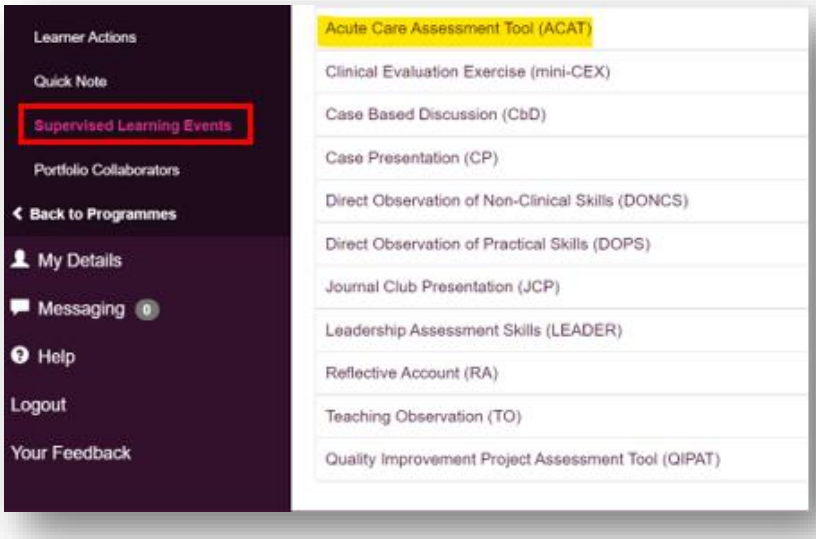

As the educational supervisor and/or designated prescribing practitioner, you are able to initiate these forms within your learner's E-portfolio.

## 8.1 Acute care assessment tool (ACAT)

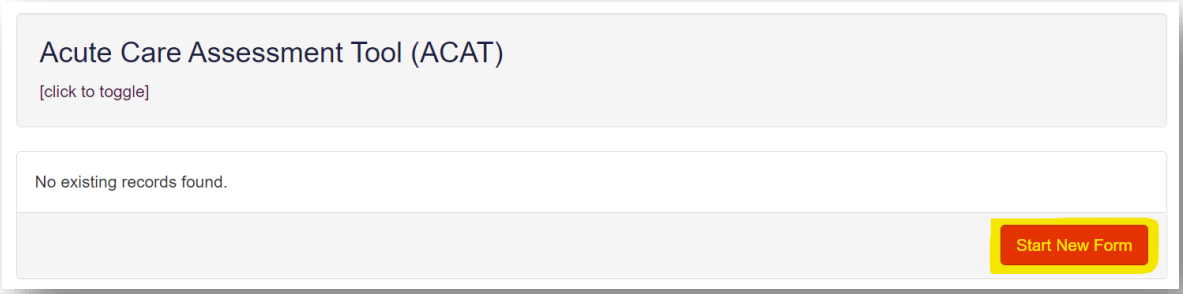
The tool is an evaluation of your learner's clinical assessment and management, decision making, team working, time management, record keeping, prioritisation and handover over a continuous period of time across multiple patients.

### 8.1.1 Creating and completing an Acute Care Assessment Tool

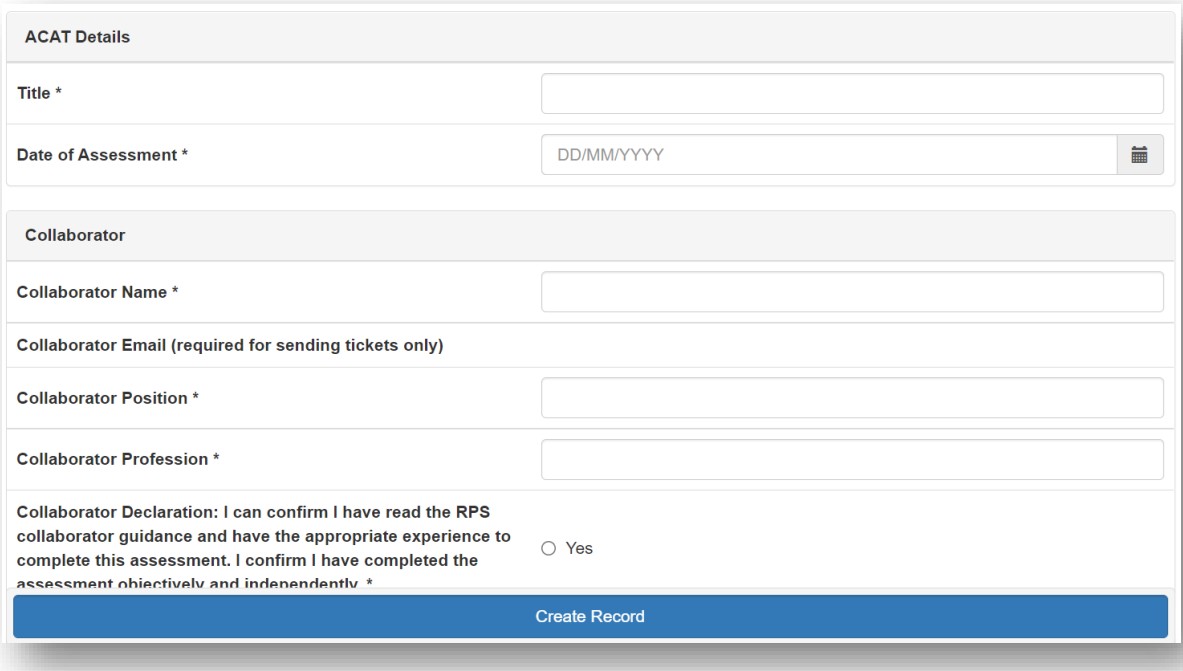
On the menu, select "**Supervised Learning Events"** then "**Acute care assessment tool (ACAT)**" or select "**Acute care assessment tool"** from the dashboard.



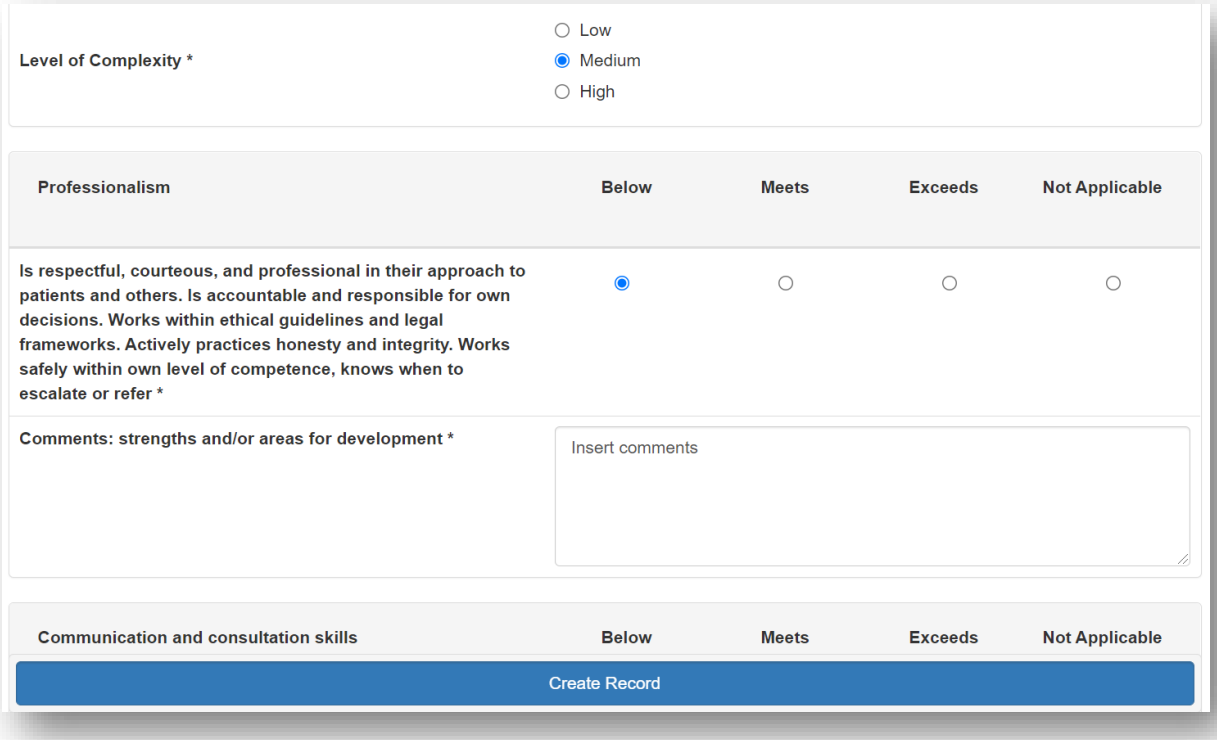
Select “**Start New Form**” to create a new record.




The ‘Acute Care Assessment Tool’ form will appear. Completed the required fields as instructed.



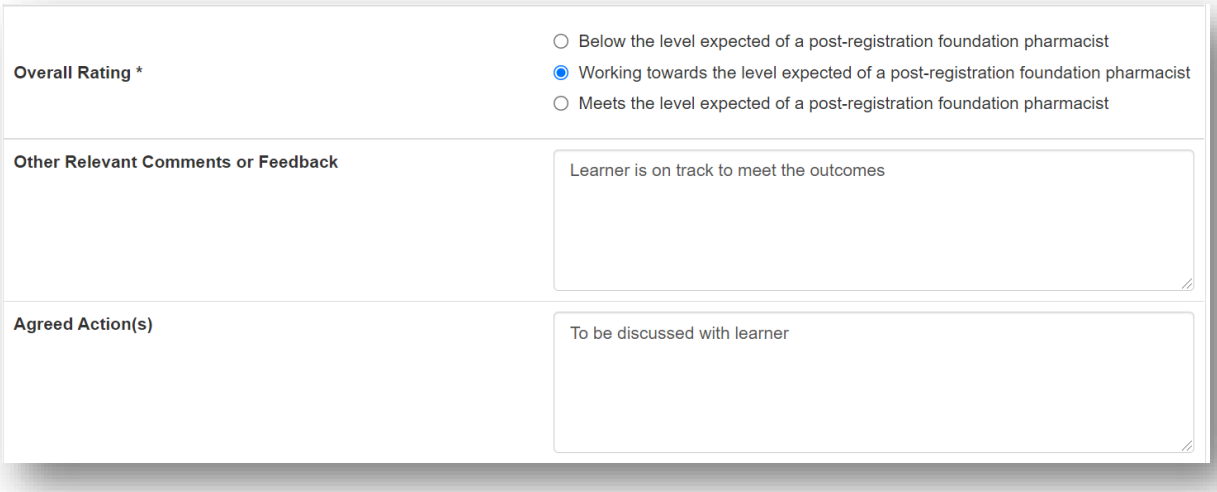

Please ensure you complete the ratings and comments fields.



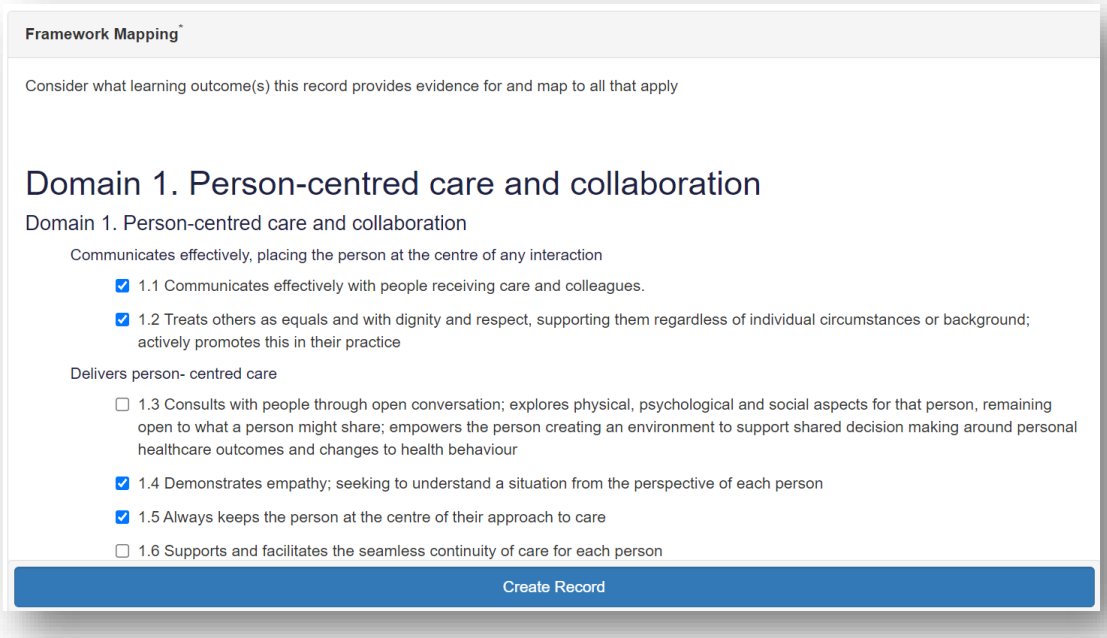

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

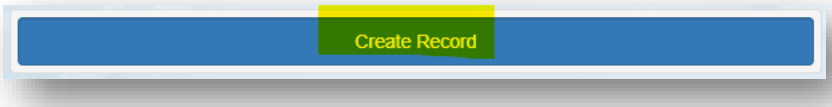
You will complete the "**Other relevant comments or feedback**". You and your learner can complete the "**Agreed action(s)**" area. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



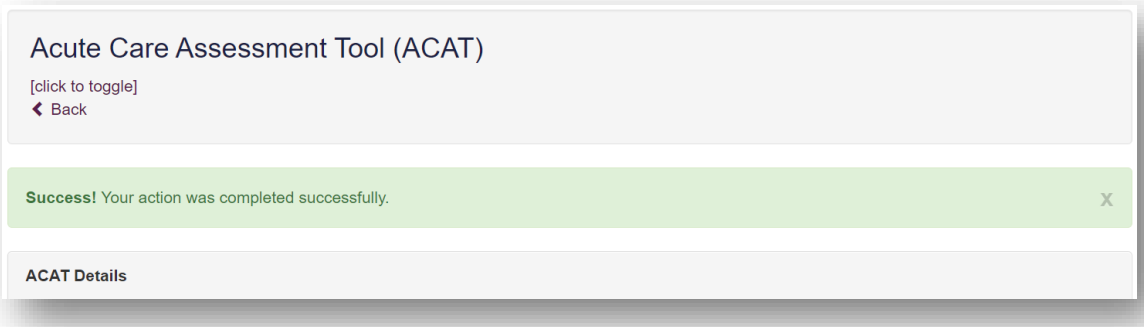

Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



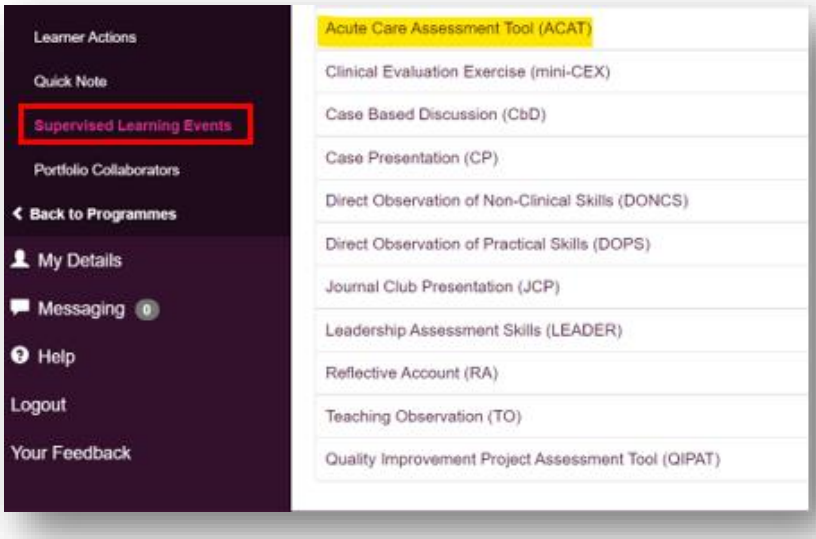

You will receive confirmation that the record has been saved and created.



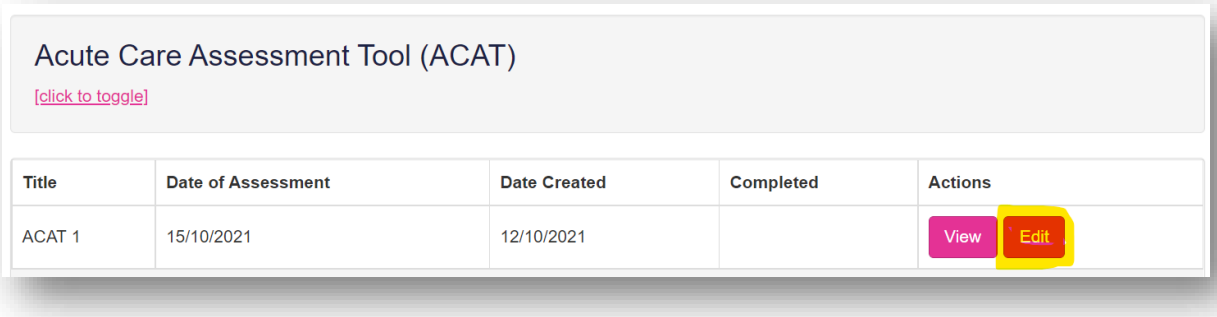

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.1.2 Reviewing an Acute Care Assessment Tool

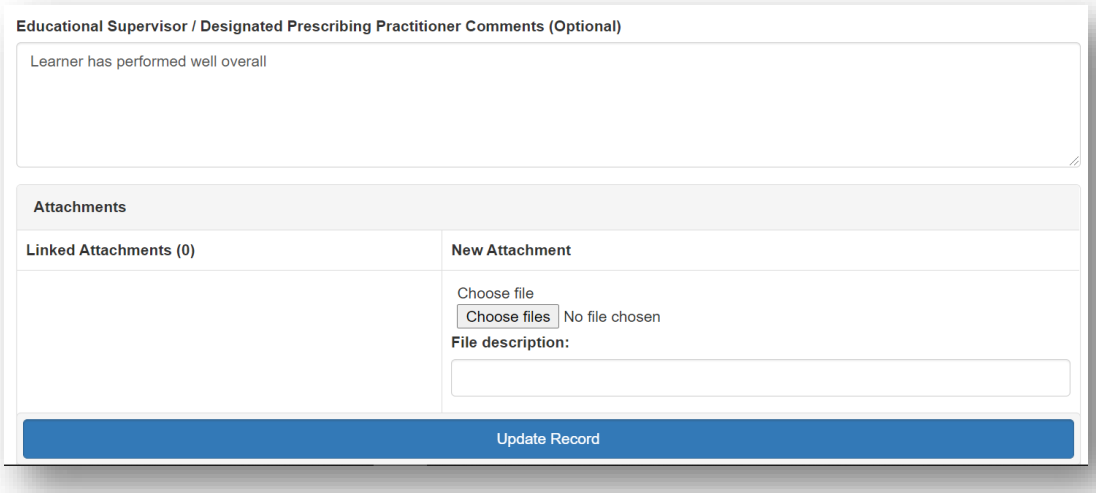
On the menu, select "**Supervised Learning Events"** then "**Acute Care Assessment Tool (ACAT)**" or select "**Acute Care Assessment Tool (ACAT)"** from the dashboard.



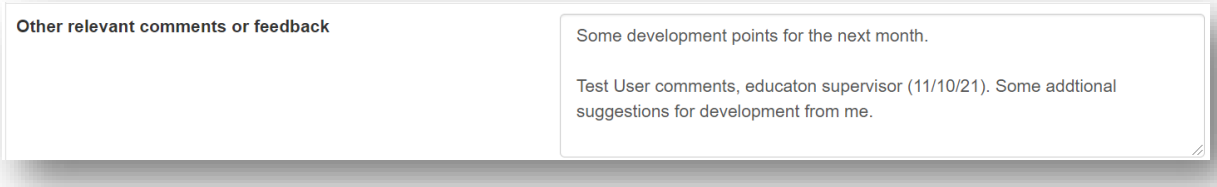

Select the record you want to review by clicking on "**Edit**" next to the record details.



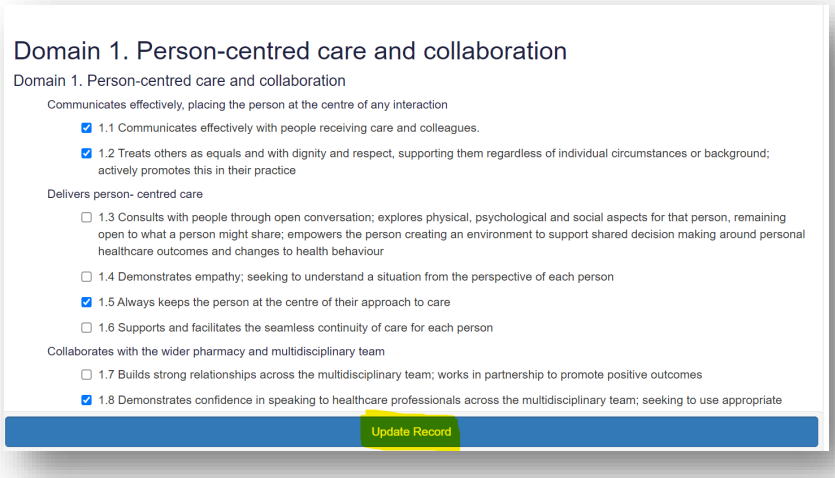

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



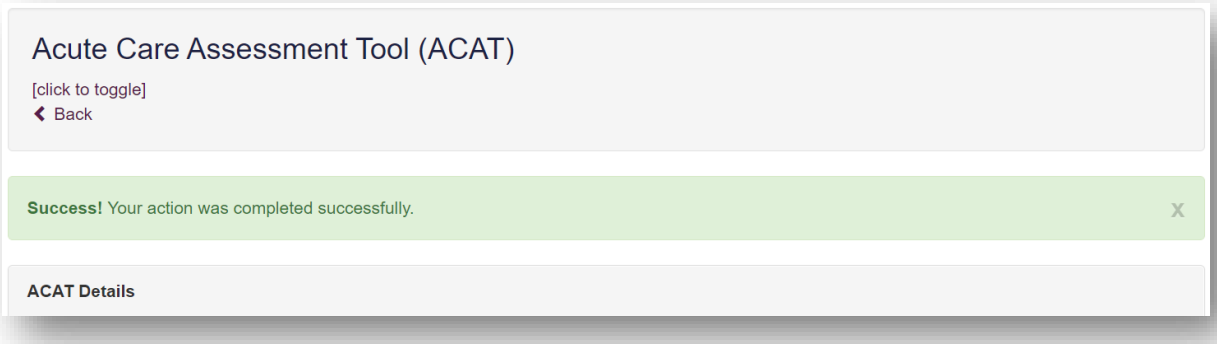
**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".




You will receive confirmation that the record has been updated.



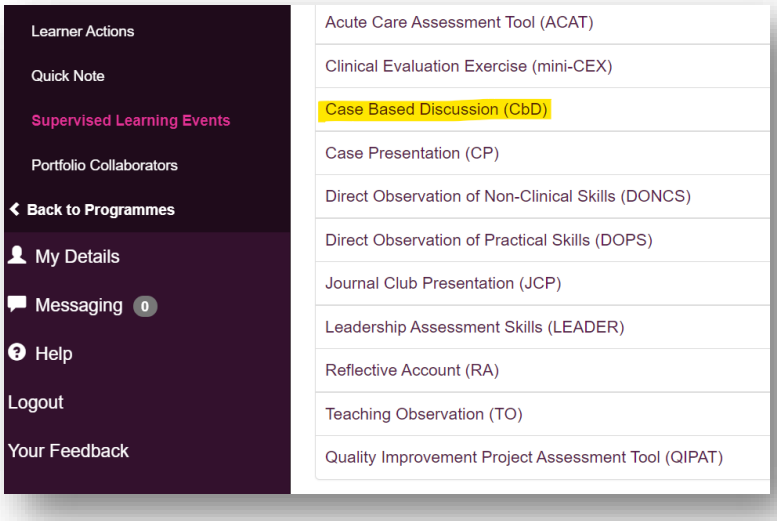

Your learner can then mark the record as complete.

## 8.2 Case Based Discussion (CbD)

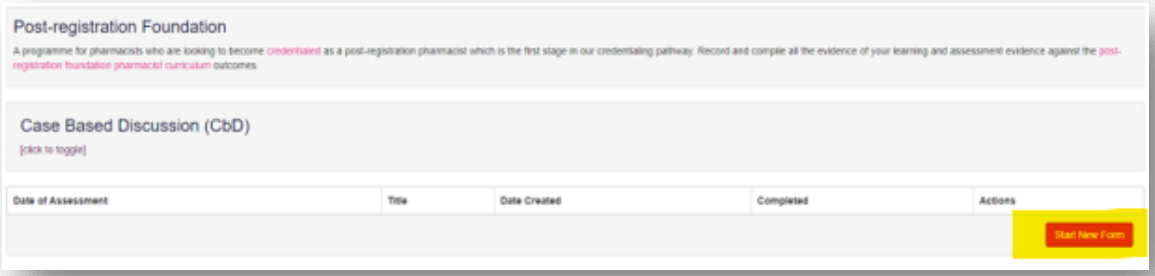
The tool is a retrospective evaluation of your learner's input into patient care. It is a structured discussion undertaken remotely from the patient(s) and is used to explore clinical reasoning, decision making and application of complex clinical knowledge in practice.

### 8.2.1 Creating a Case Based Discussion

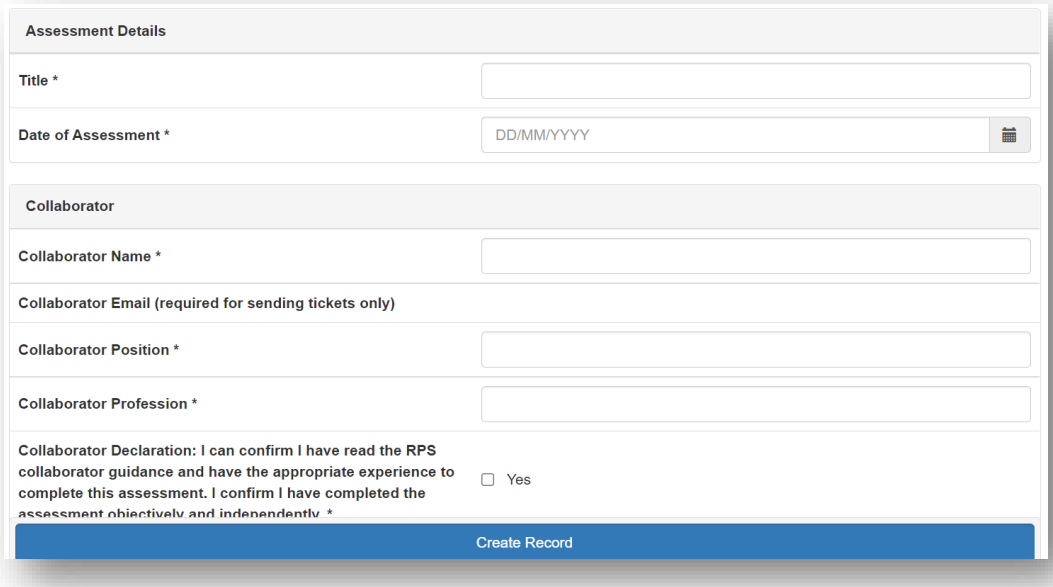
On the menu, select "**Supervised Learning Events"** then "**Case Based Discussion (CbD)**" or select "**Case Based Discussion (CbD)"** from the dashboard.



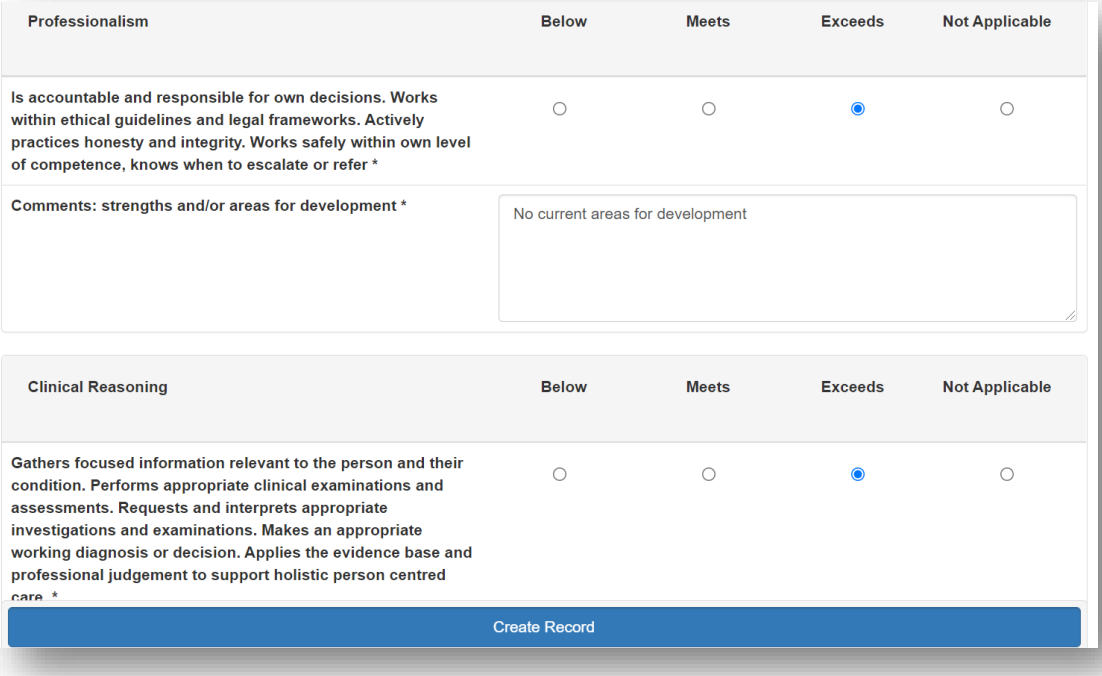

Select "**Start New**" to create a new record.




The 'Case Based Discussion' form will appear. Completed the required fields as instructed.



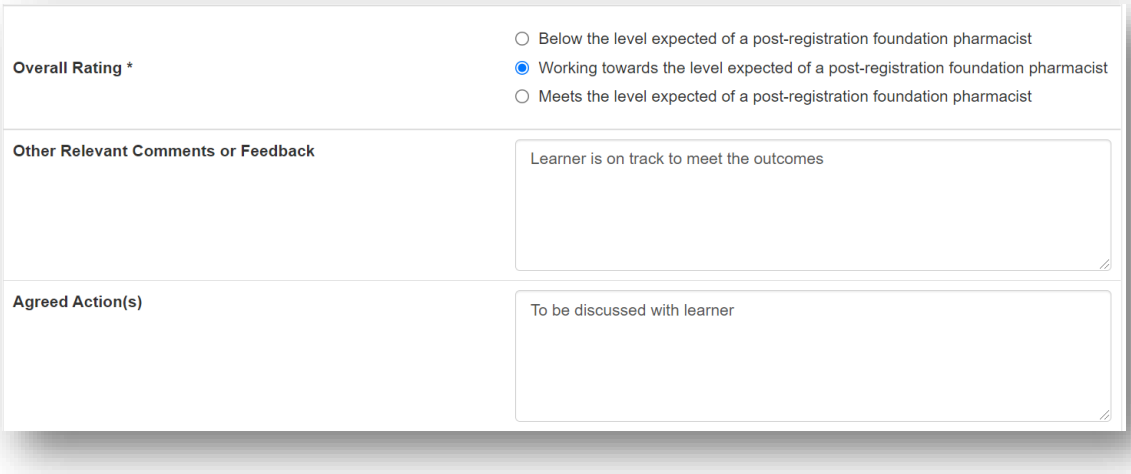

Please ensure you complete the ratings and comments fields.



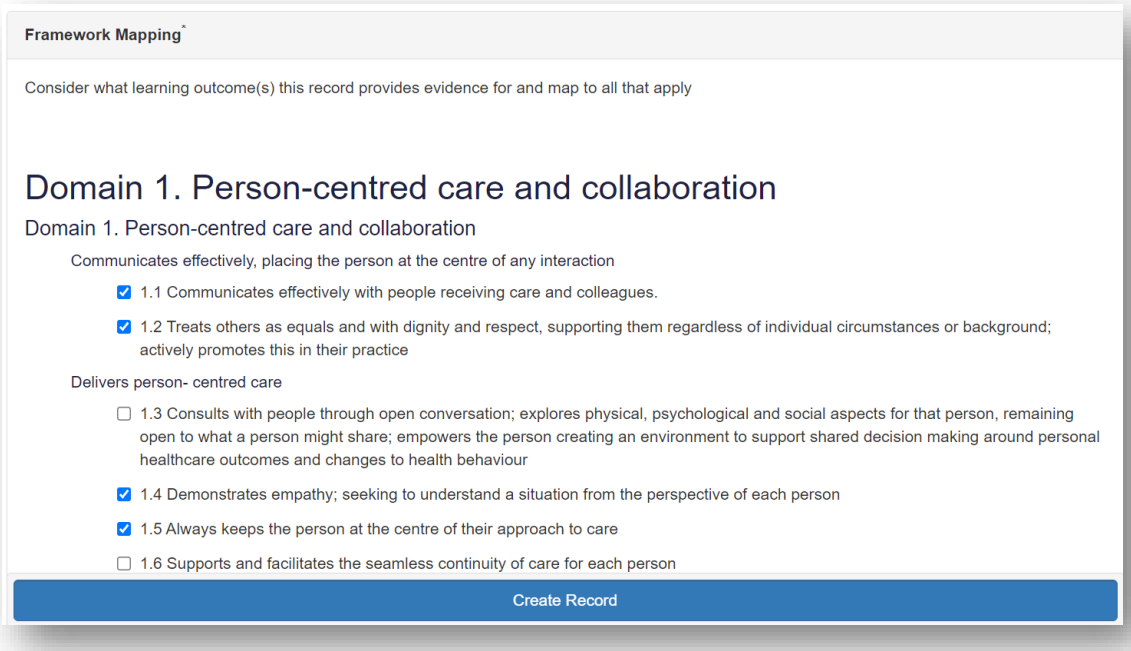

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

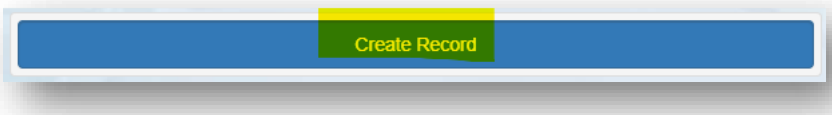
You will complete the "**Other relevant comments or feedback**". You and your learner can complete the "**Agreed action(s)**" area. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



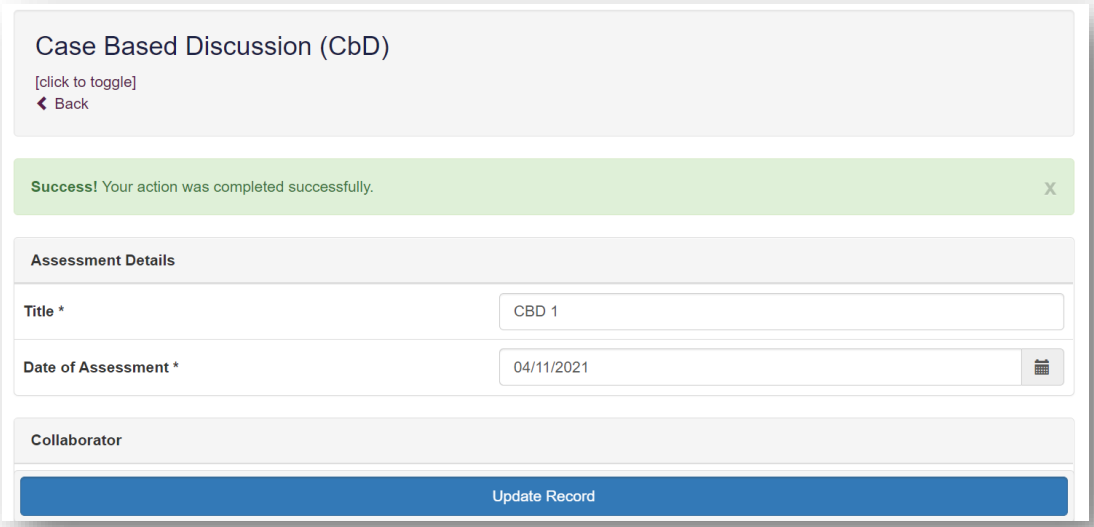

Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



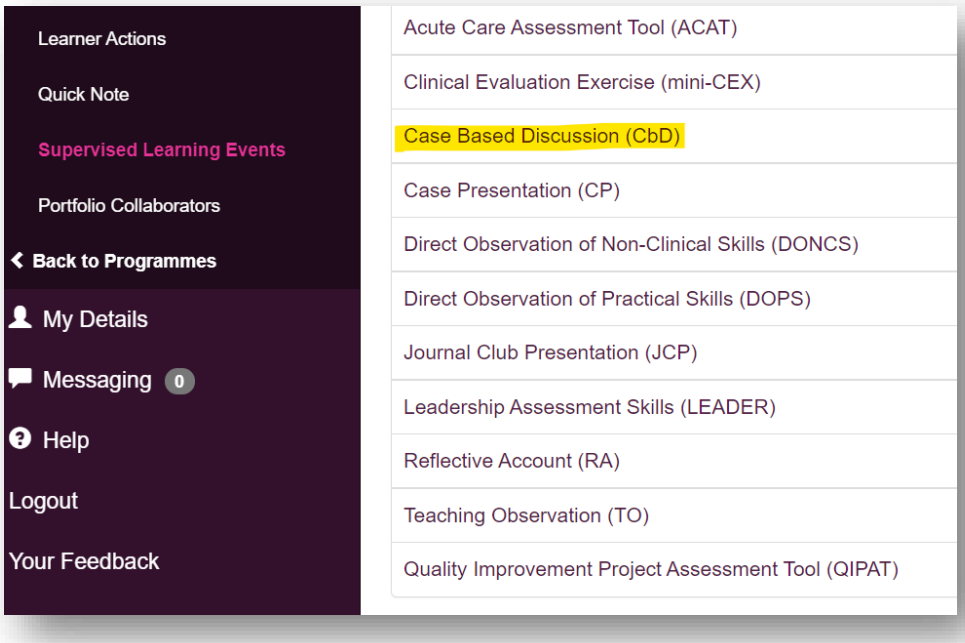

You will receive confirmation that the record has been saved and created.



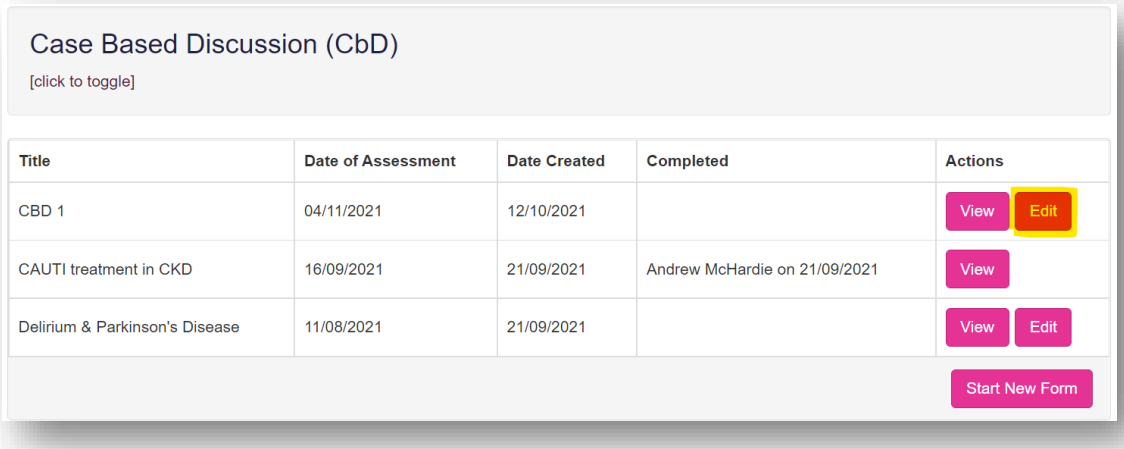

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.2.2 Reviewing a Case Based Discussion

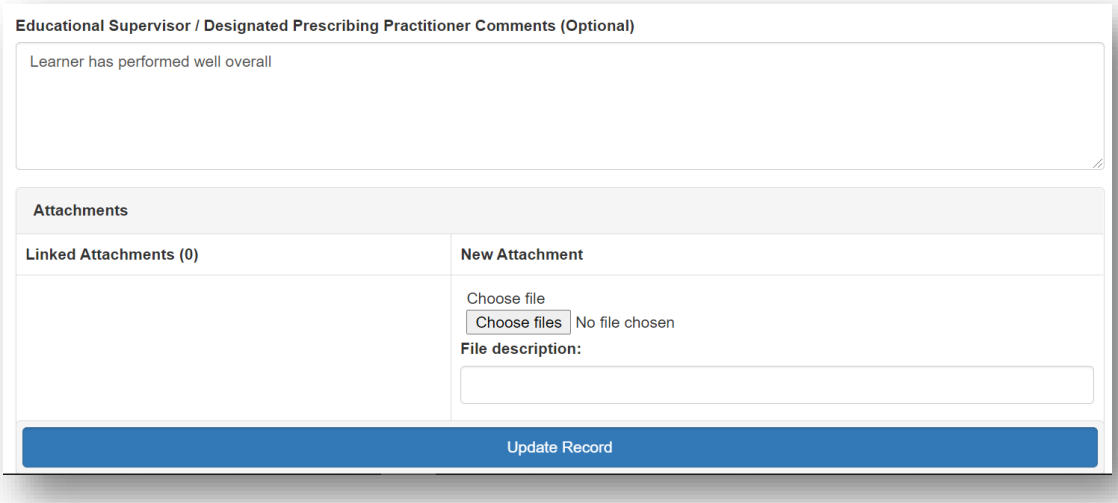
On the menu, select "**Supervised Learning Events"** then "**Case Based Discussion (CbD)**" or select "**Case Based Discussion (CbD)**" from the dashboard.



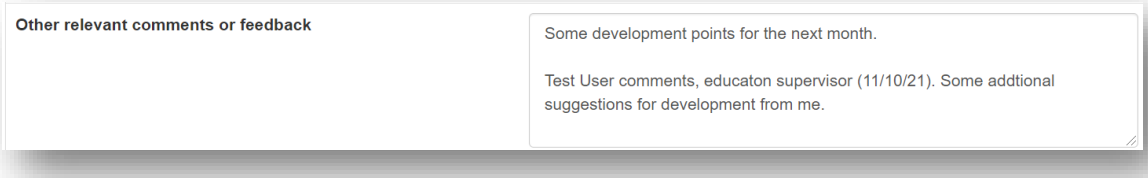

Select the record you want to review by clicking on "**Edit**" next to the record details.



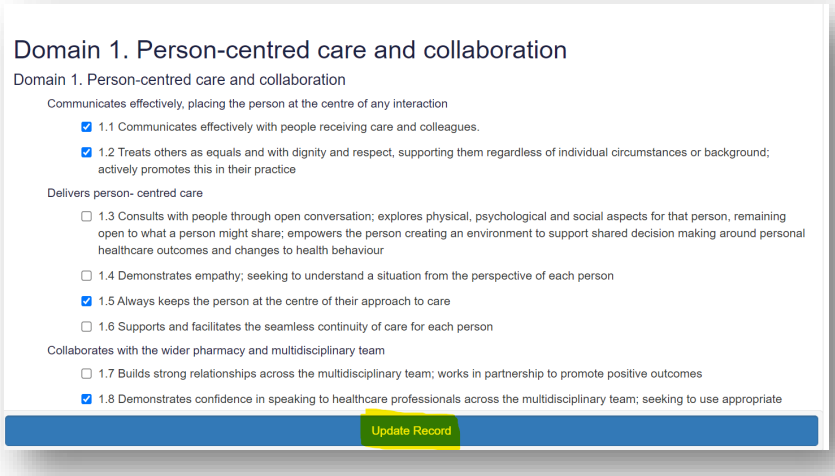

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



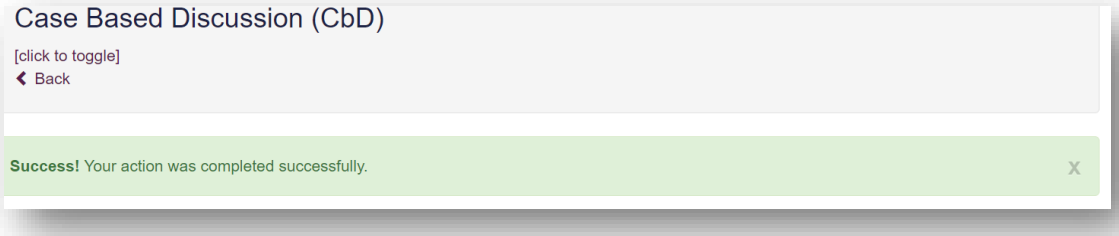

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.



When done select “**Update Record**”.




You will receive confirmation that the record has been updated.



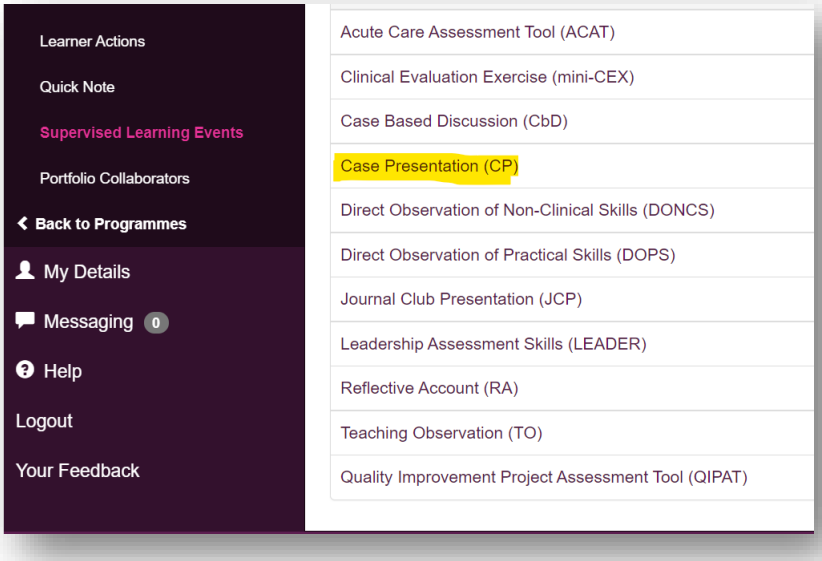

Your learner can then mark the record as complete.

## 8.3 Case presentation (CP)

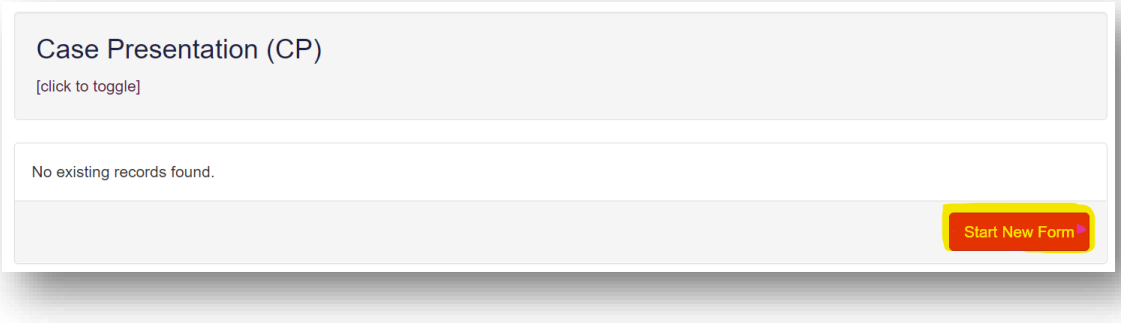
The tool is an evaluation of your learner’s ability to effectively present a case to colleagues demonstrating effective clinical assessment and management, decision making, team working and time management.

### 8.3.1 Creating a Case Presentation

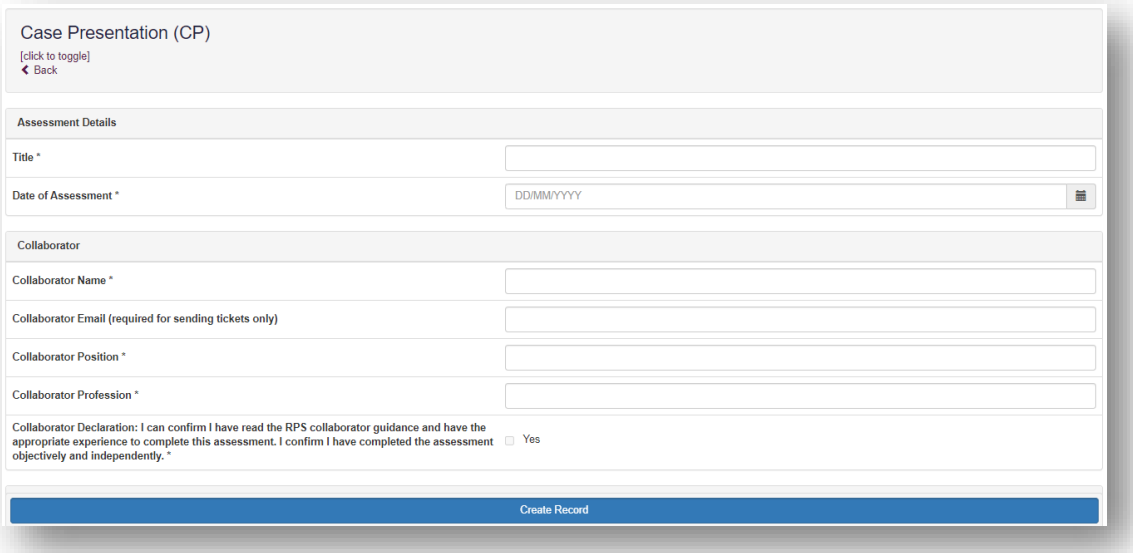
On the menu select “**Supervised Learning Events”** then “**Case presentation (CP)**” or select “**Case presentation (CP)**” from the dashboard.



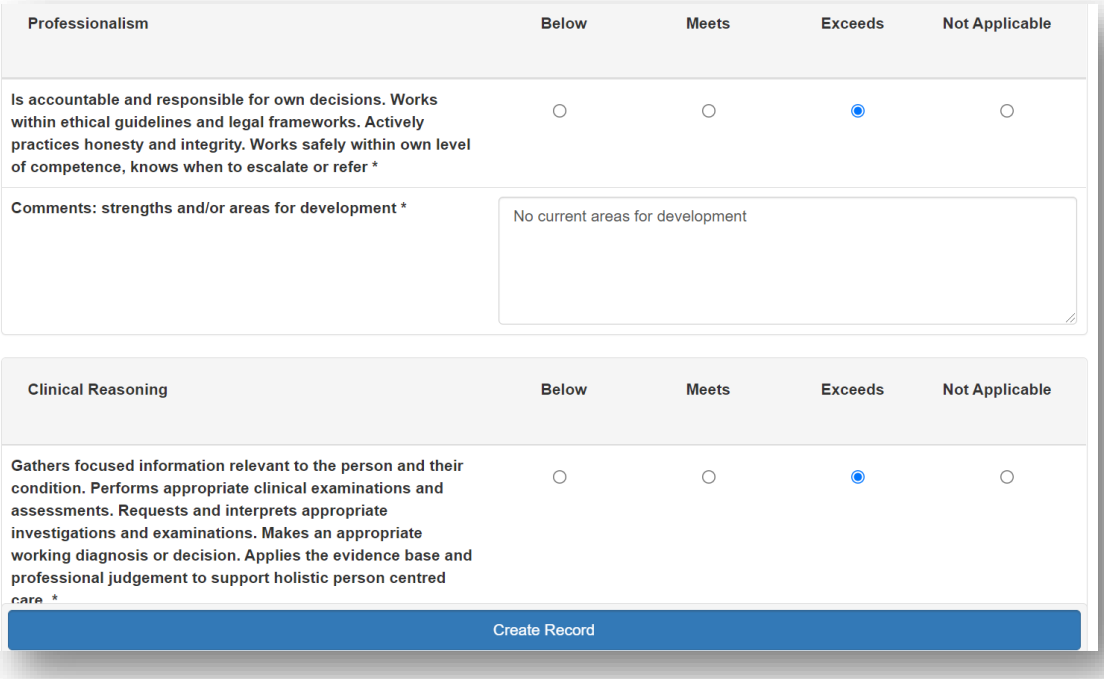

Select "**Start New Form**" to create a new record.




The 'Case Presentation' form will appear. Completed the required fields as instructed.



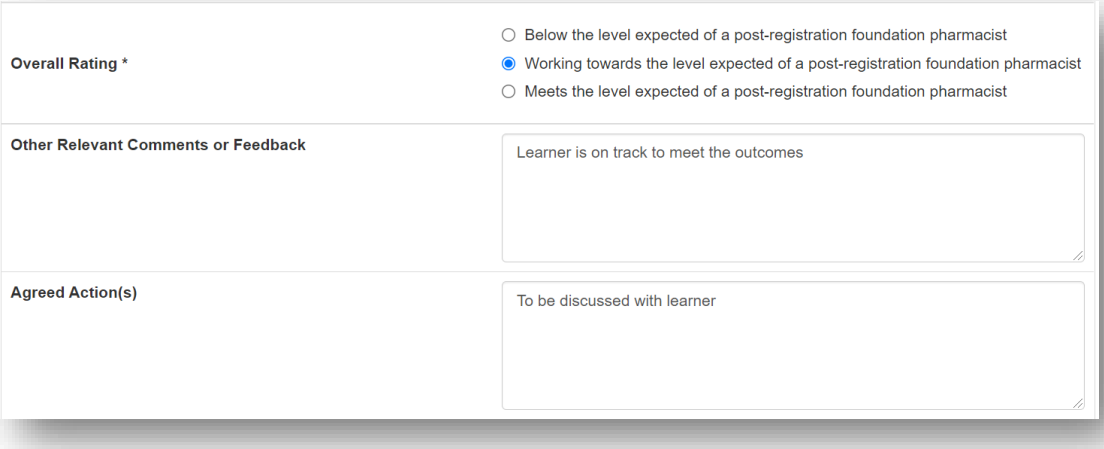

Please ensure you complete the ratings and comments fields.



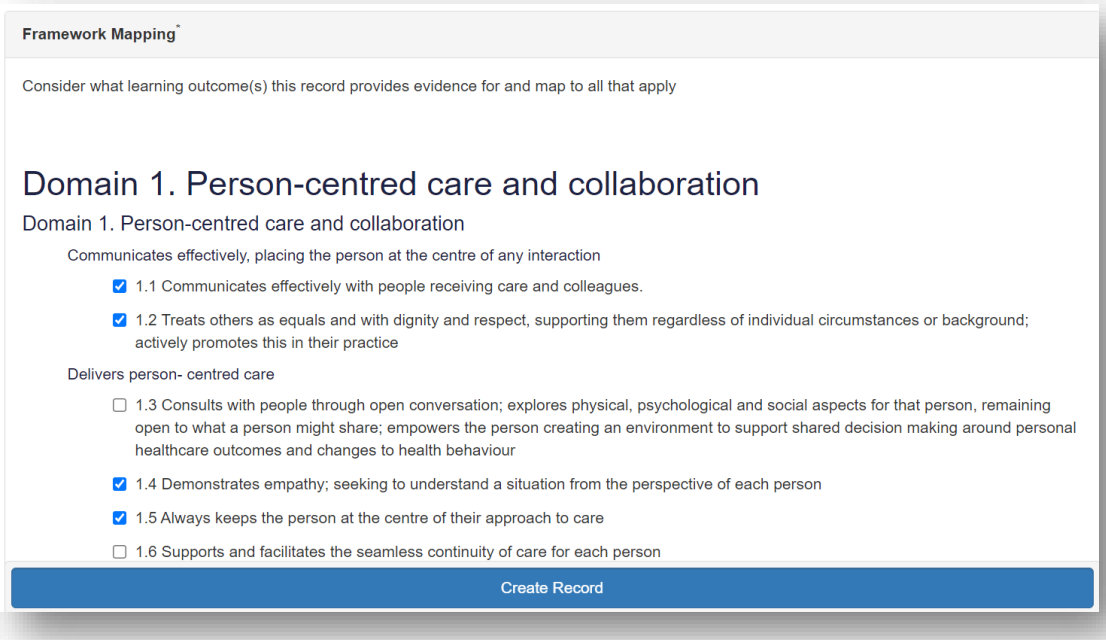

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

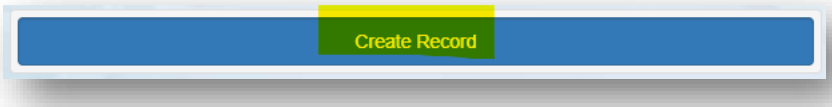
You will complete the "**Other relevant comments or feedback**". You and your learner can complete the "**Agreed action(s)**" area. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



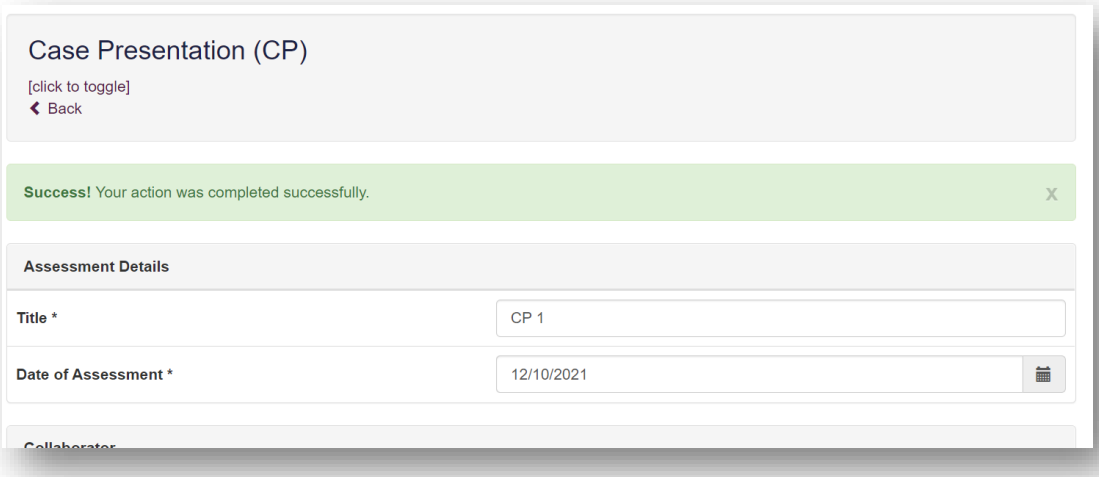

Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



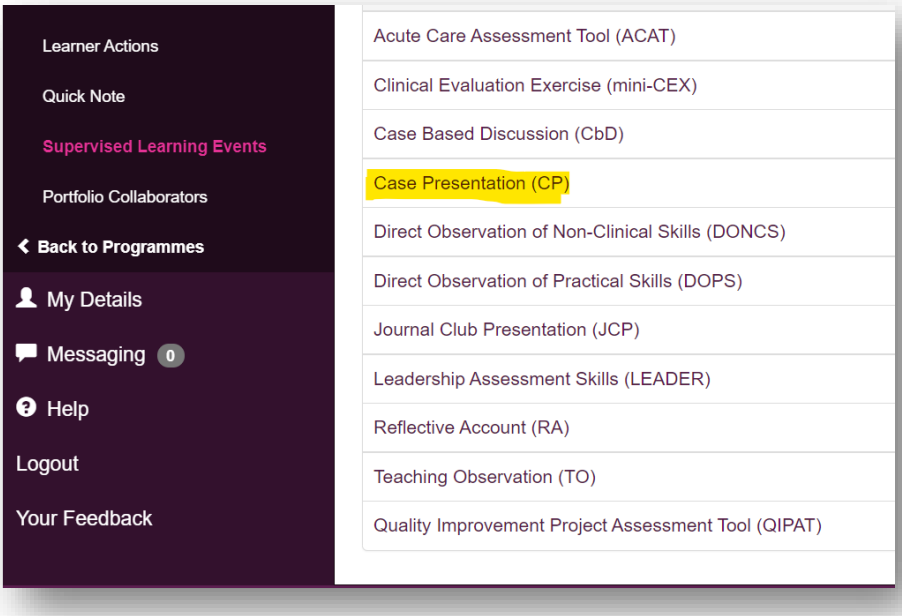

You will receive confirmation that the record has been saved and created.



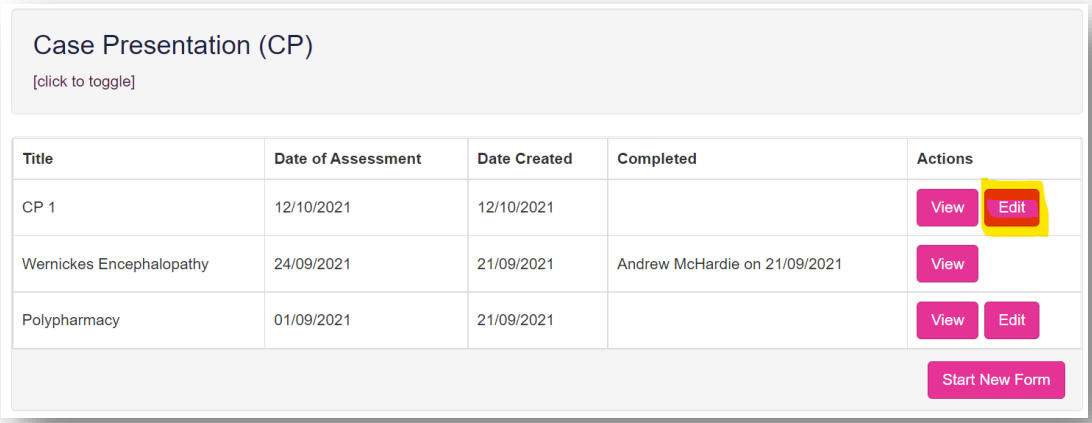

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.3.2 Reviewing a Case Presentation

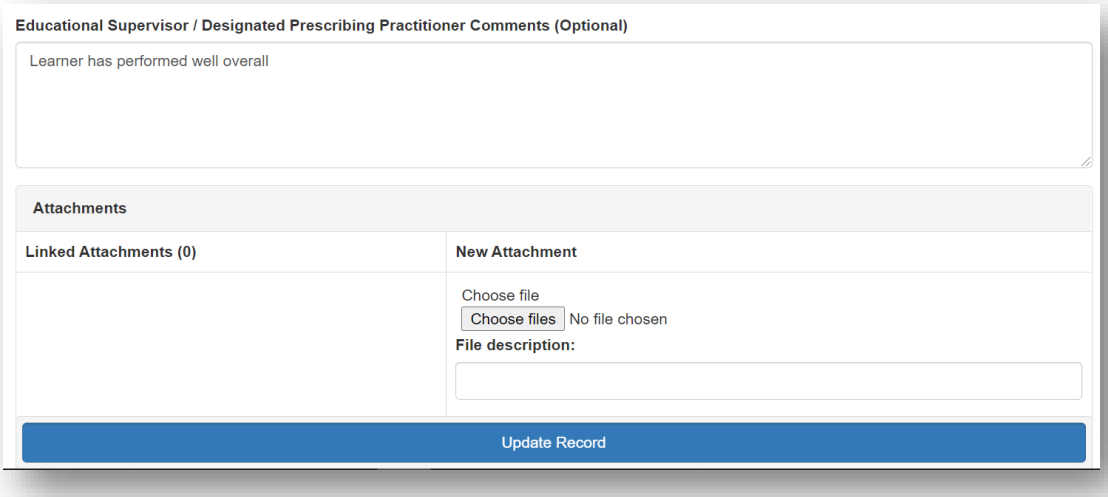
On the menu, select "**Supervised Learning Events**" then "**Case presentation (CP)**" or select "**Case presentation (CP)**" from the dashboard.



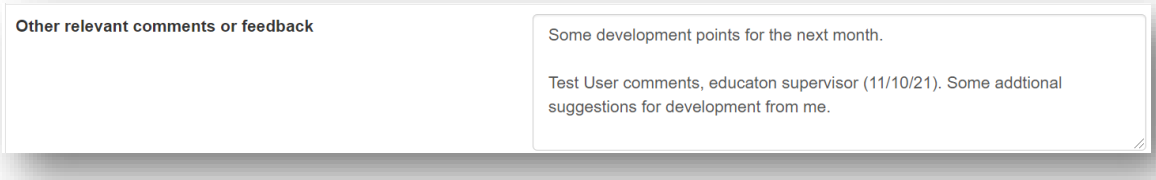

Select the record you want to review by clicking on **"Edit"** next to the record details.



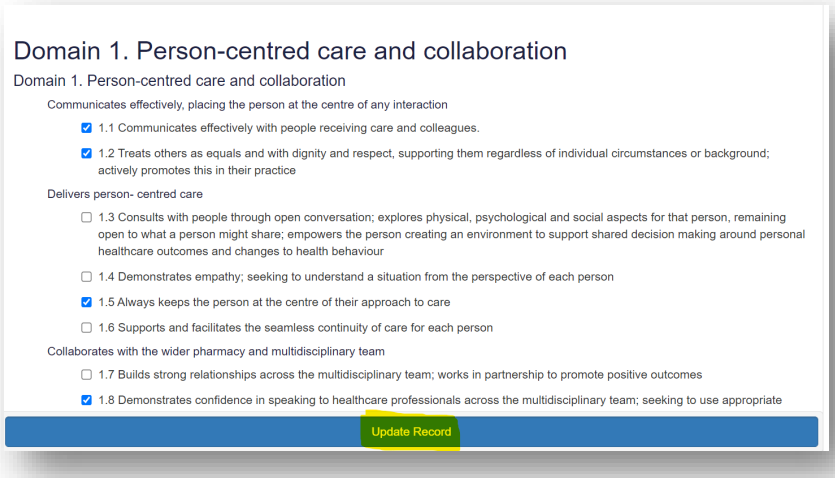

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



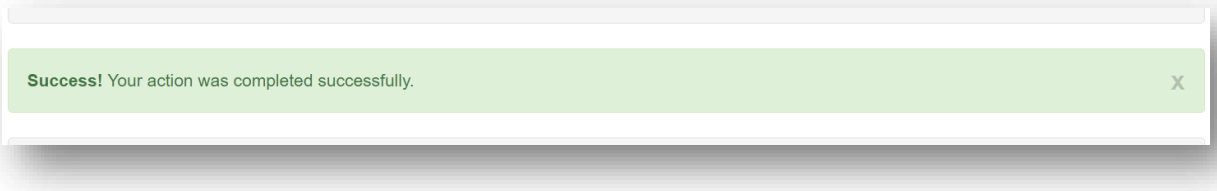

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".



You will receive confirmation that the record has been updated



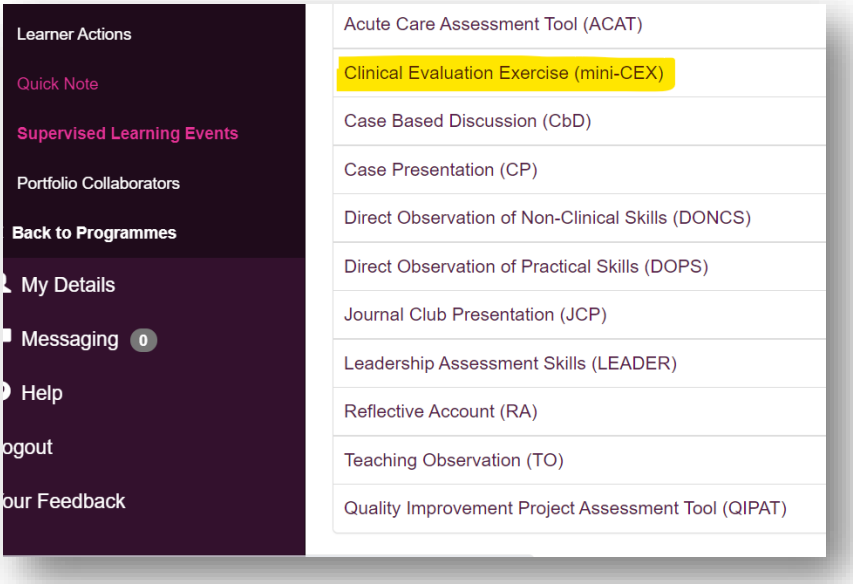

Your learner can then mark the record as complete.

## 8.4 Clinical Evaluation Exercise (mini-CEX)

The tool is an evaluation of your learner's global clinical encounter with a patient assessing the synthesis of skills essential for clinical care such as history taking, communication, examination and clinical reasoning.

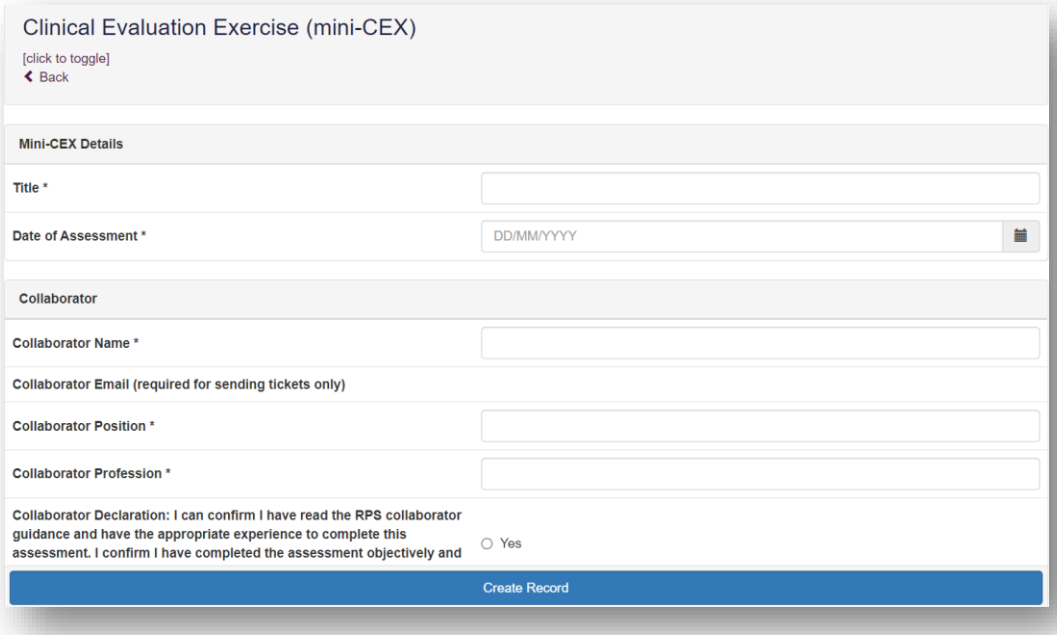
### 8.4.1 Creating and completing a Clinical Evaluation Exercise

On the menu select "**Supervised Learning Events**" then "**Clinical Evaluation Exercise (mini-CEX)**" or selecting "**Clinical Evaluation Exercise (mini-CEX)**" from the dashboard.

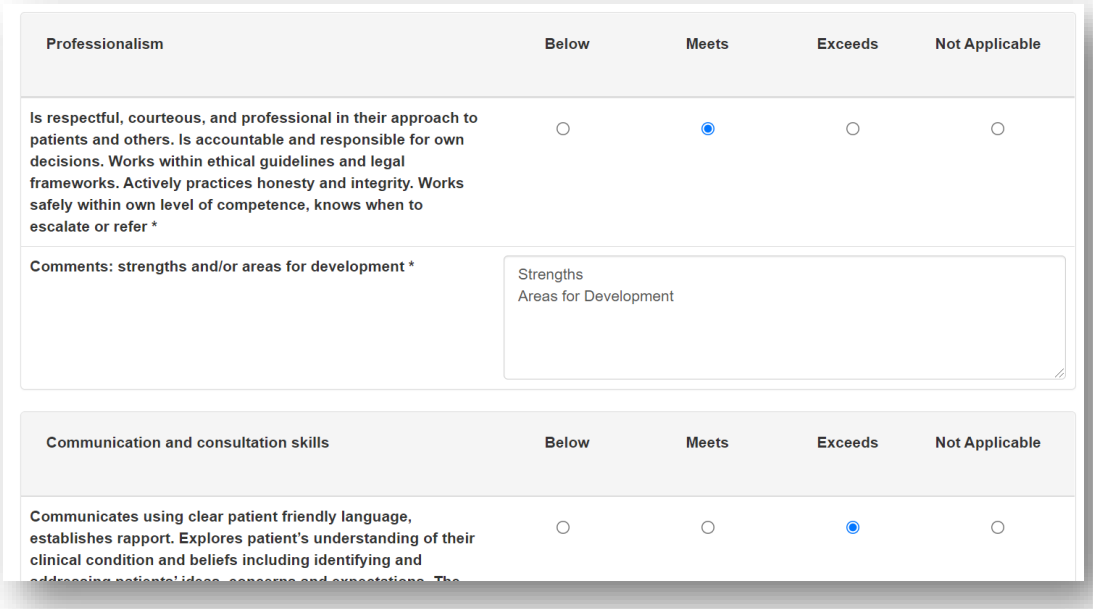



Select "**Start New**" to create a new record.

The ‘Clinical Evaluation Exercise’ form will open. Completed the required fields as instructed.



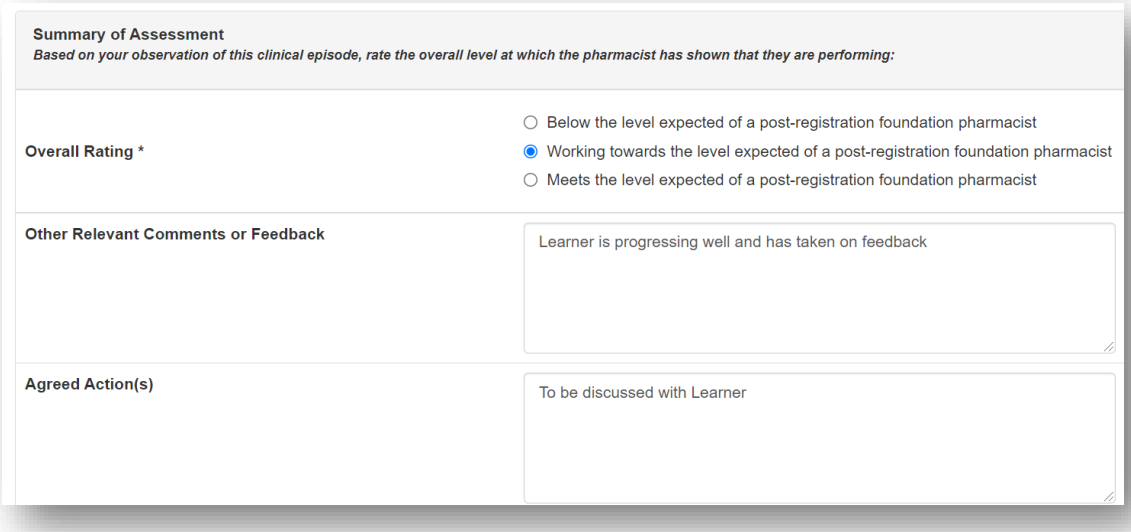

Please ensure you complete the ratings and comments fields



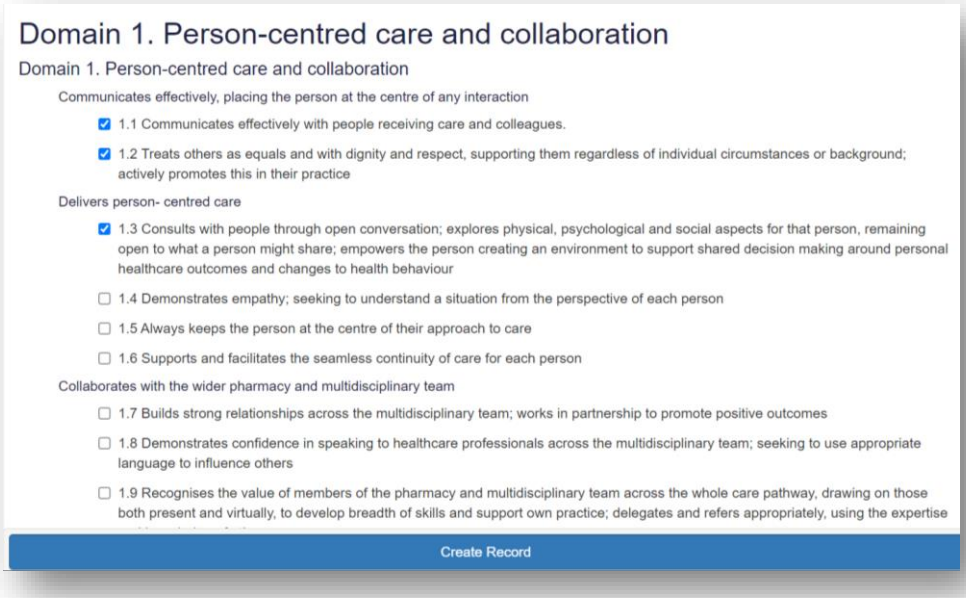

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

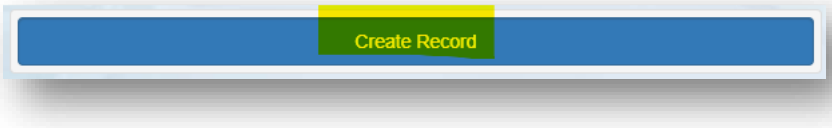
You will complete the "**Other relevant comments or feedback**". You and your learner can complete the "**Agreed action(s)**" area. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



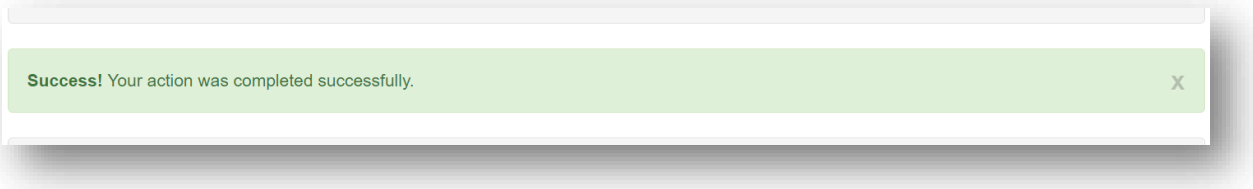

Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



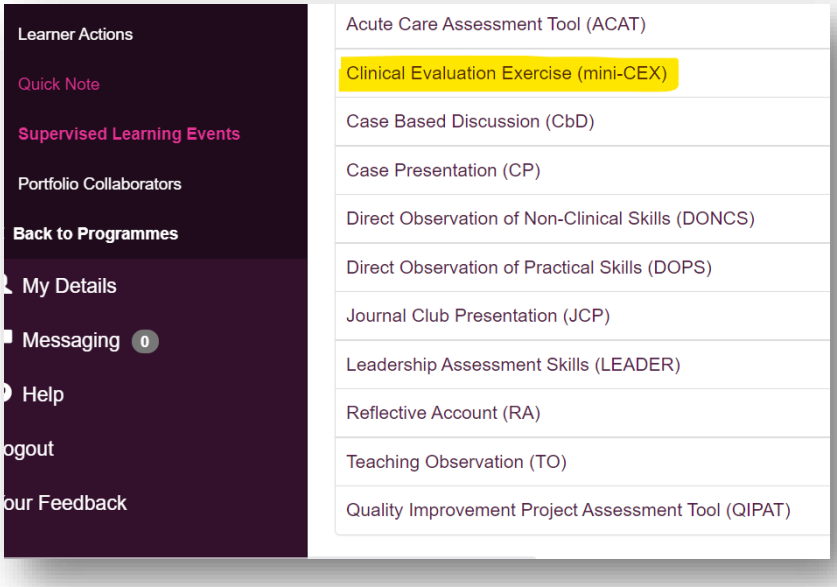

You will receive confirmation that the record has been updated.



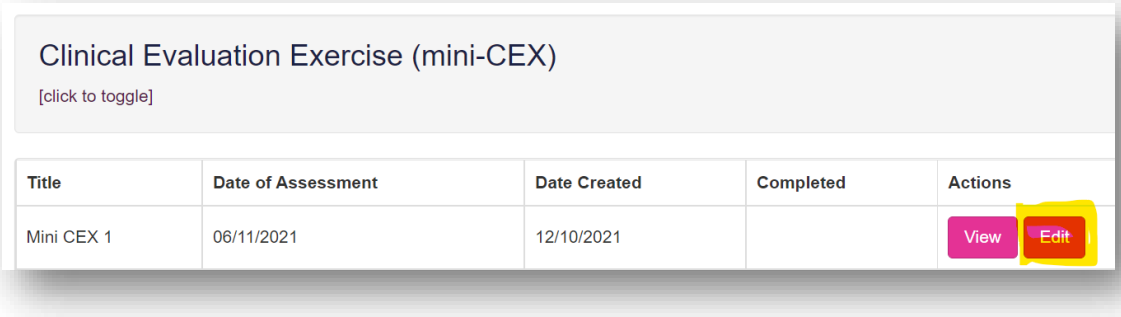

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.4.2 Reviewing a Clinical Evaluation Exercise

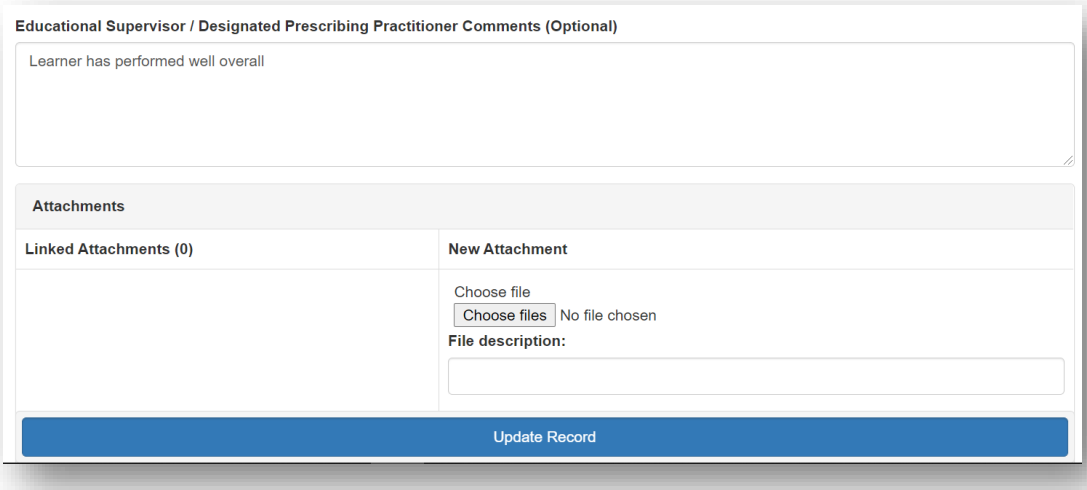
On the menu, select "**Supervised Learning Events"** then "**Clinical Evaluation Exercise (mini-CEX)**" or select "**Clinical Evaluation Exercise (mini-CEX)**" from the dashboard.



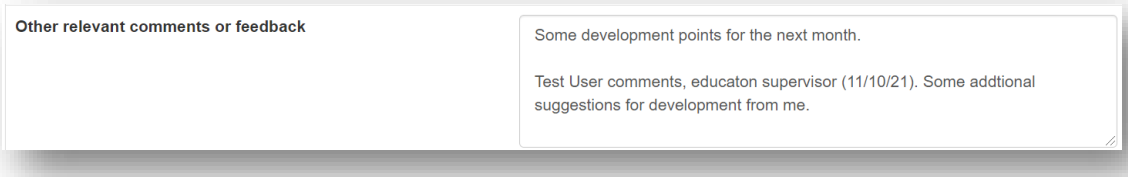

Select the record you want to review by clicking on "**Edit**" next to the record details.



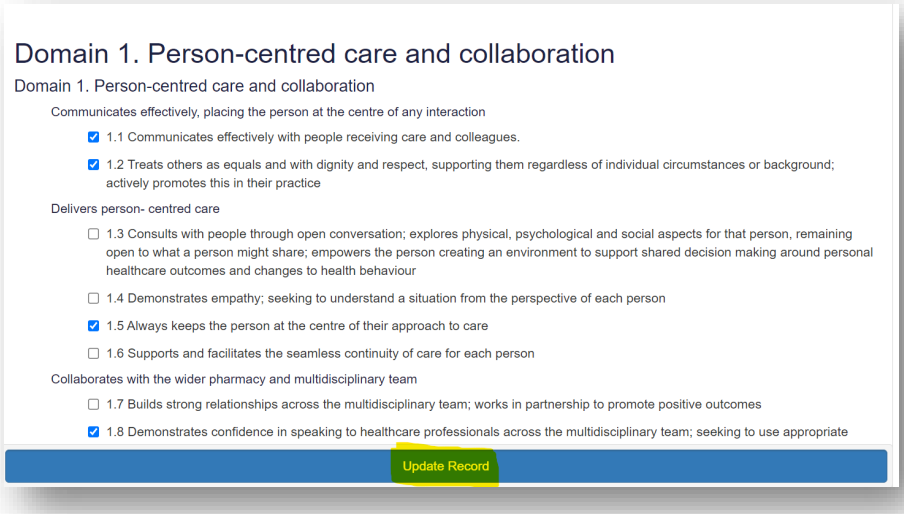

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



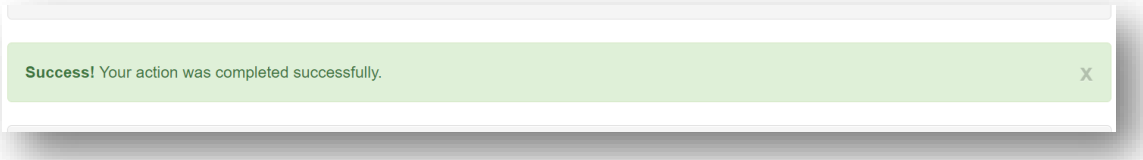
**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".




You will receive confirmation that the record has been updated



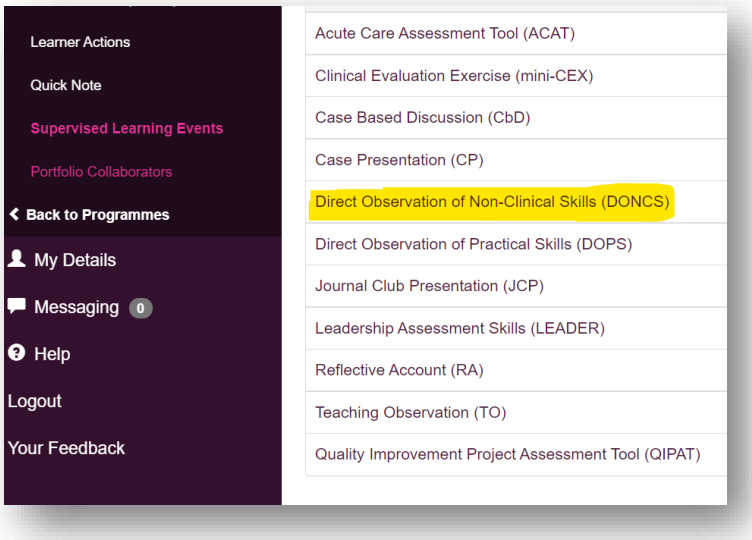

Your learner can then mark the record as complete.

## 8.5 Direct Observation of Non-Clinical Skills (DONCS)

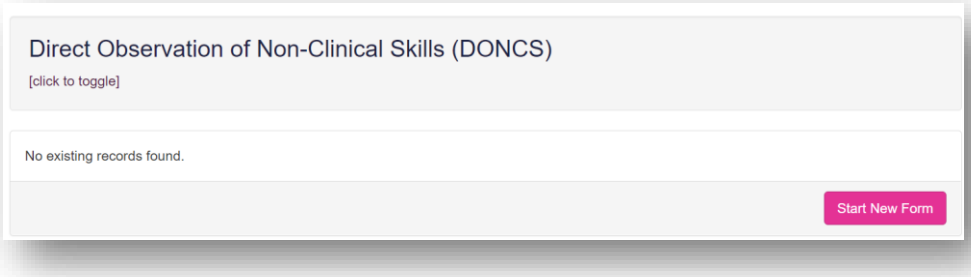
The tool is an evaluation of your learner's non-clinical skills.

### 8.5.1 Creating and completing a Direct Observation of Non-Clinical Skills

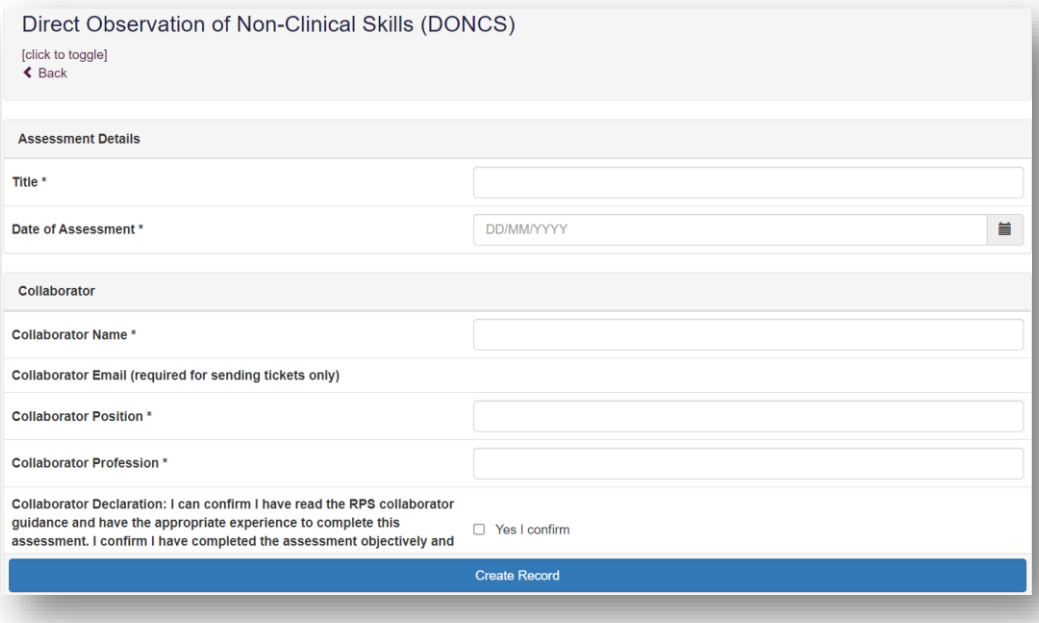
On the menu select "**Supervised Learning Events**" then "**Direct Observation of Non-Clinical Skills (DONCS)**" or select "**Direct Observation of Non-Clinical Skills (DONCS)**".




Select "**Start New Form**" to create a new record.

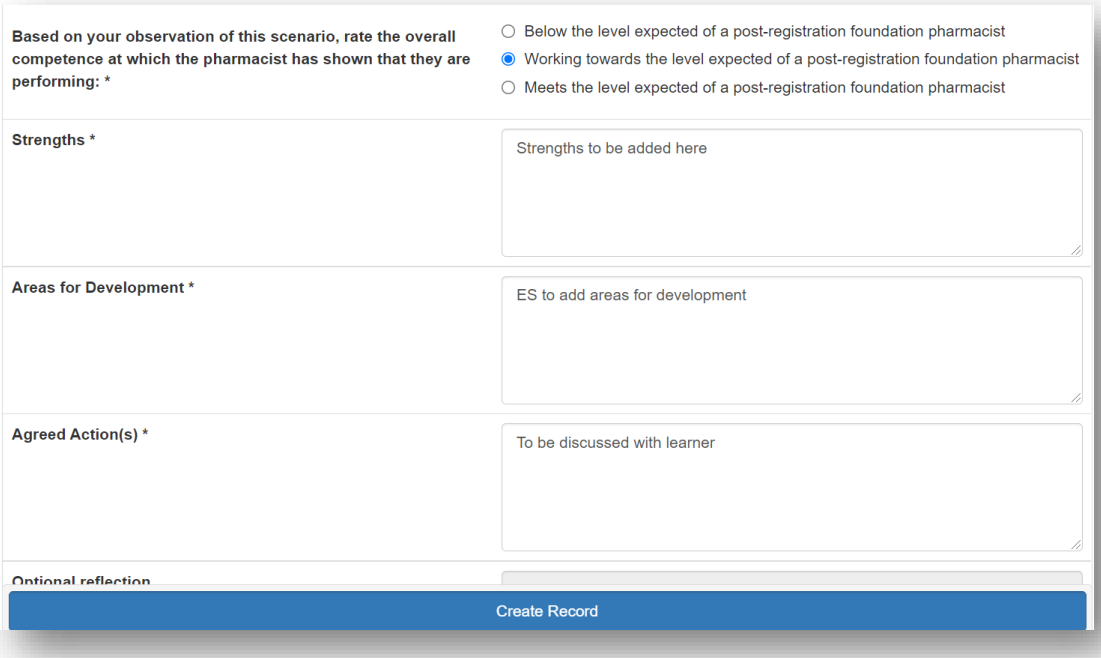



The 'Direct Observation of Non-Clinical Skills' form will appear. Completed the required fields as instructed.



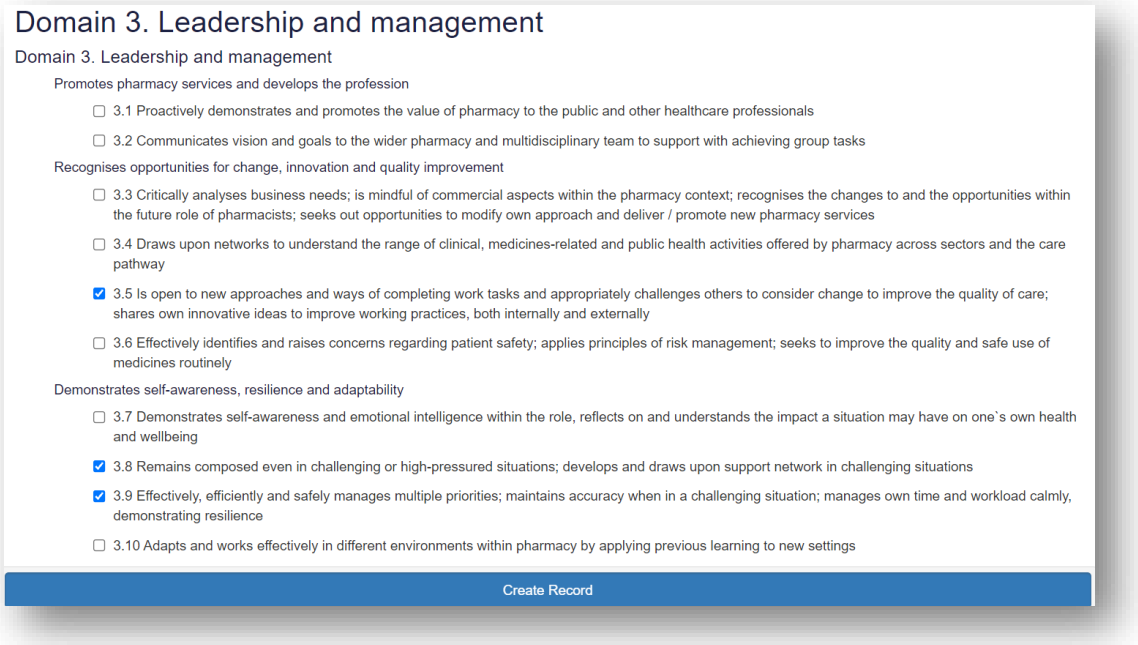

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed, including the rating and comments fields.

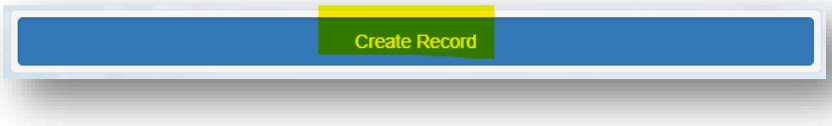



You will complete the "**Strengths**" and "**Areas for development**" sections. You and your learner can complete the "**Agreed action(s)**" section. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.

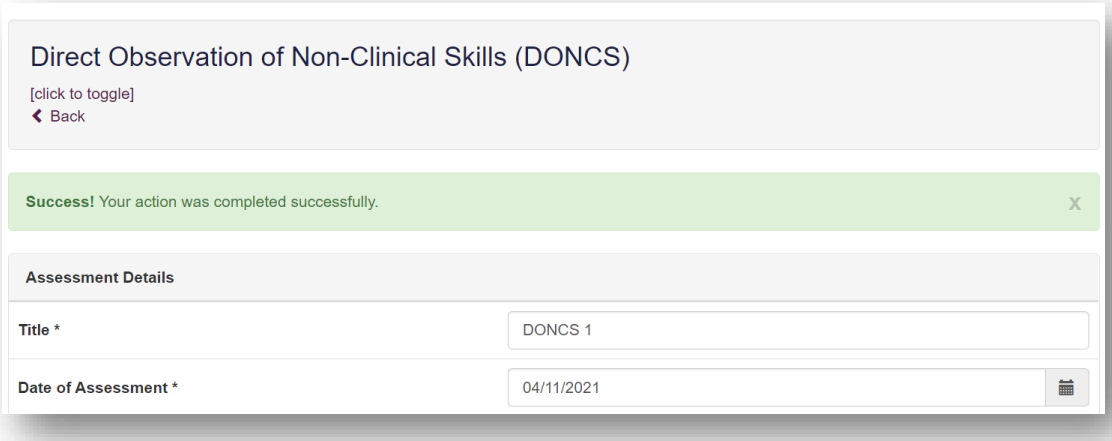
Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



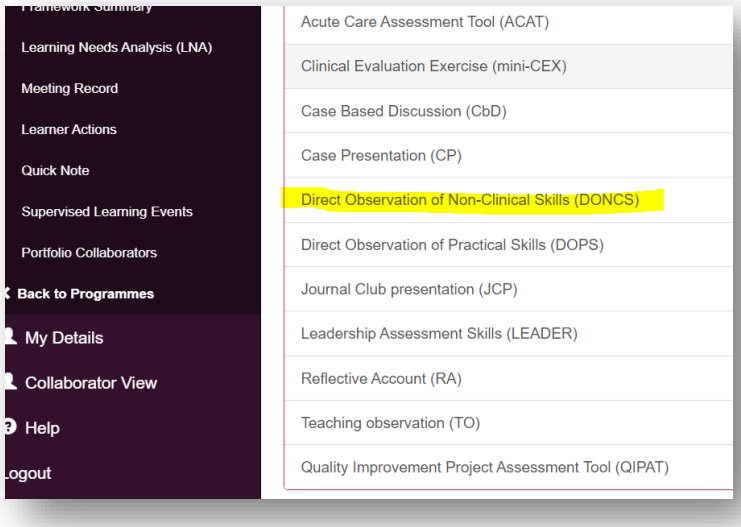

You will receive confirmation that the record has been saved and created.



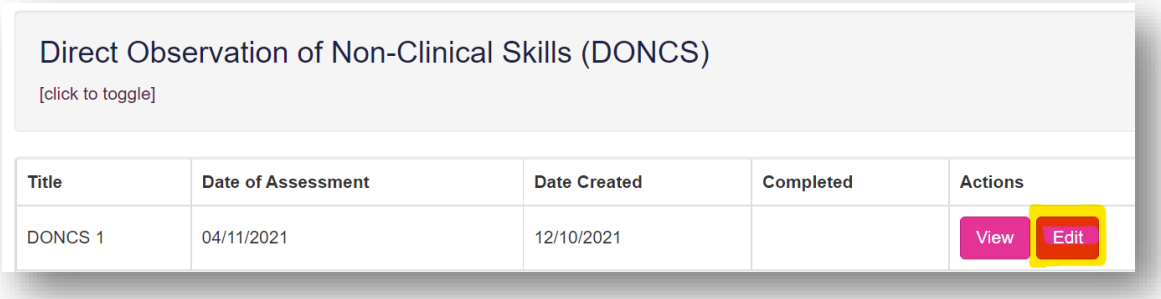

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.5.2 Reviewing a Direct Observation of Non-Clinical Skills

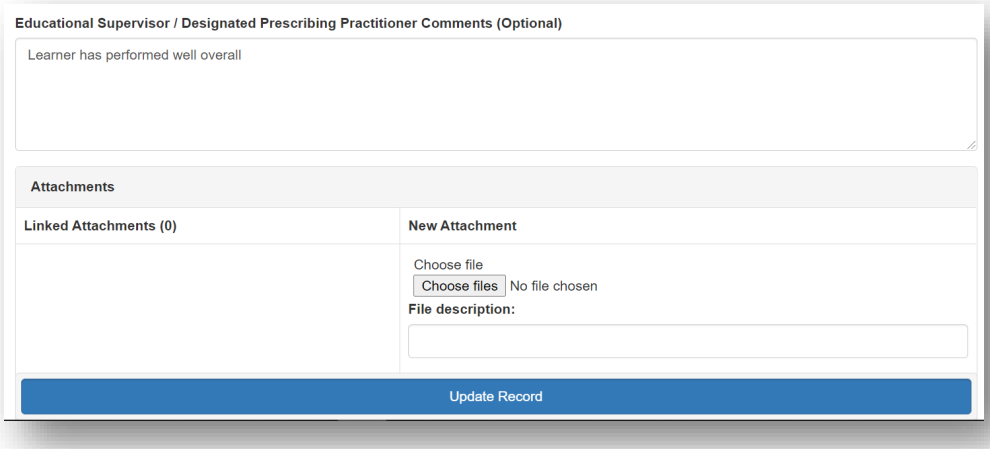
On the menu, select "**Supervised Learning Events"** then "**Direct Observation of Non-Clinical Skills (DONCS)**" or select "**Direct Observation of Non-Clinical Skills (DONCS)**" from the dashboard.



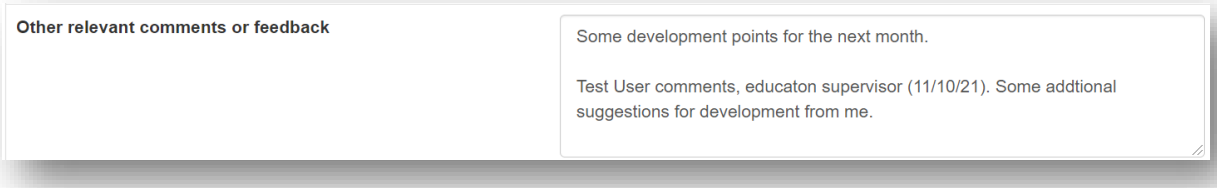

Select the record you want to review by clicking on "**Edit**" next to the record details.




Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.

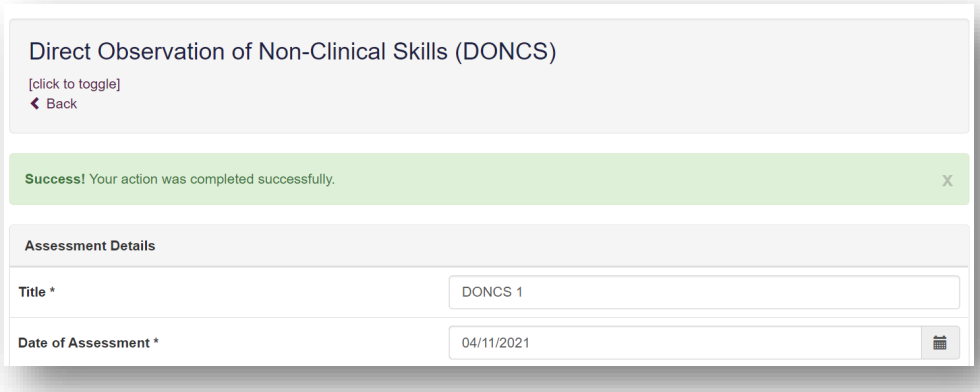


**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".

You will receive confirmation that the record has been updated



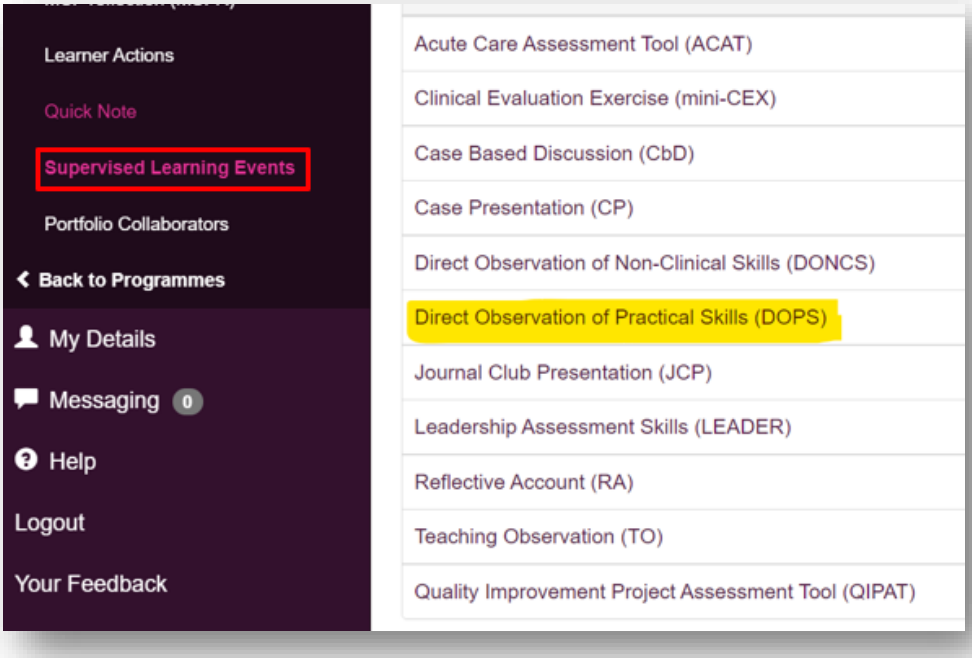

Your learner can then mark the record as complete.

## 8.6 Direct Observation of Practical Skills (DOPS)

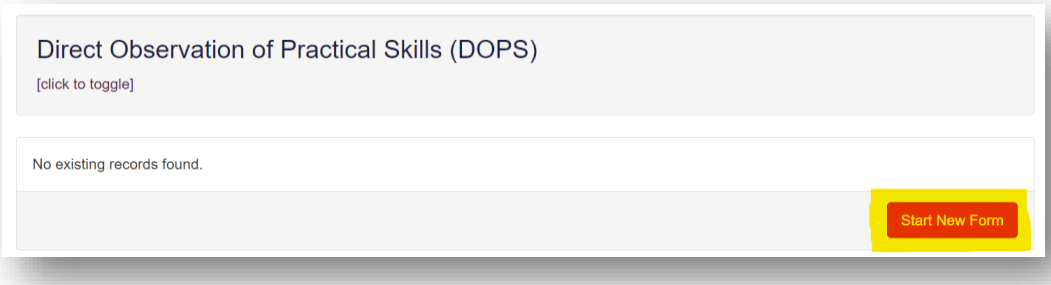
This tool is useful for your learner to demonstrate their ability to undertake a practical (clinical) skill.

### 8.6.1 Creating and completing a Direct Observation of Practical Skills

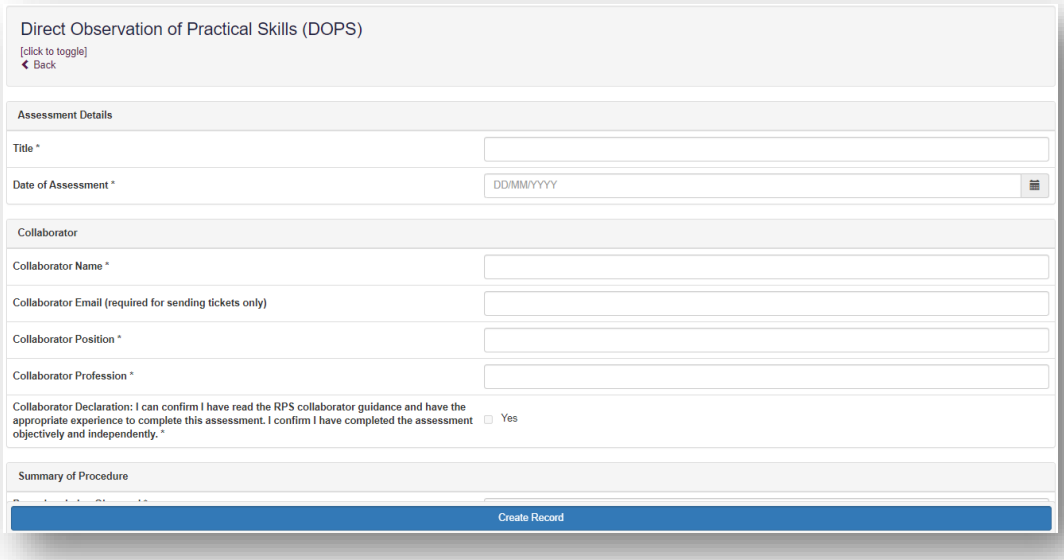
On the menu select "**Supervised Learning Events**" then "**Direct Observation of Practical Skills (DOPS)**" or select "**Direct Observation of Practical Skills (DOPS)**" from the dashboard.



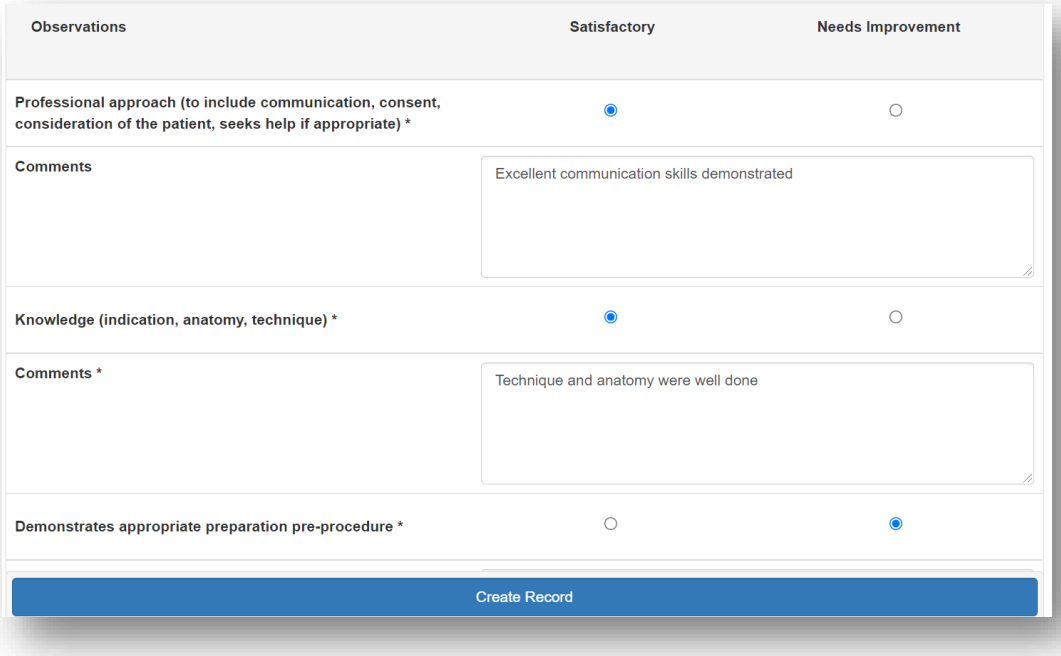

Select "**Start New Form**" to create a new record.




The 'Direct Observation of Practical Skills' form will appear. Complete the required fields as instructed.




Please ensure you complete the ratings and comments fields.

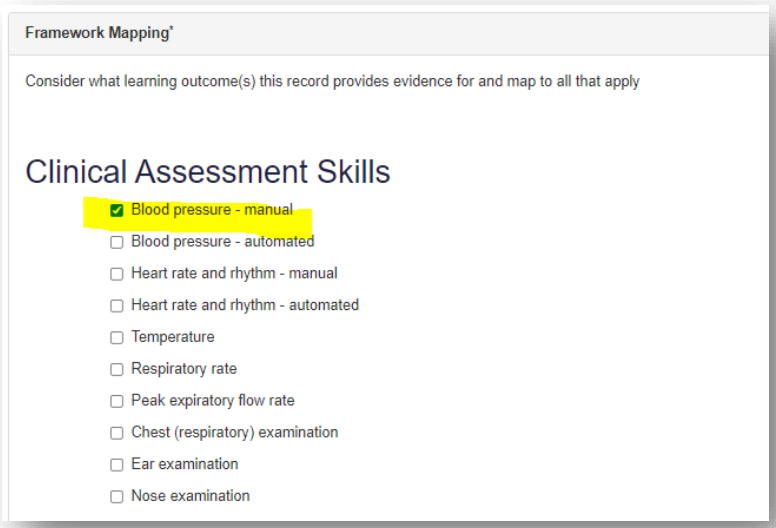



**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

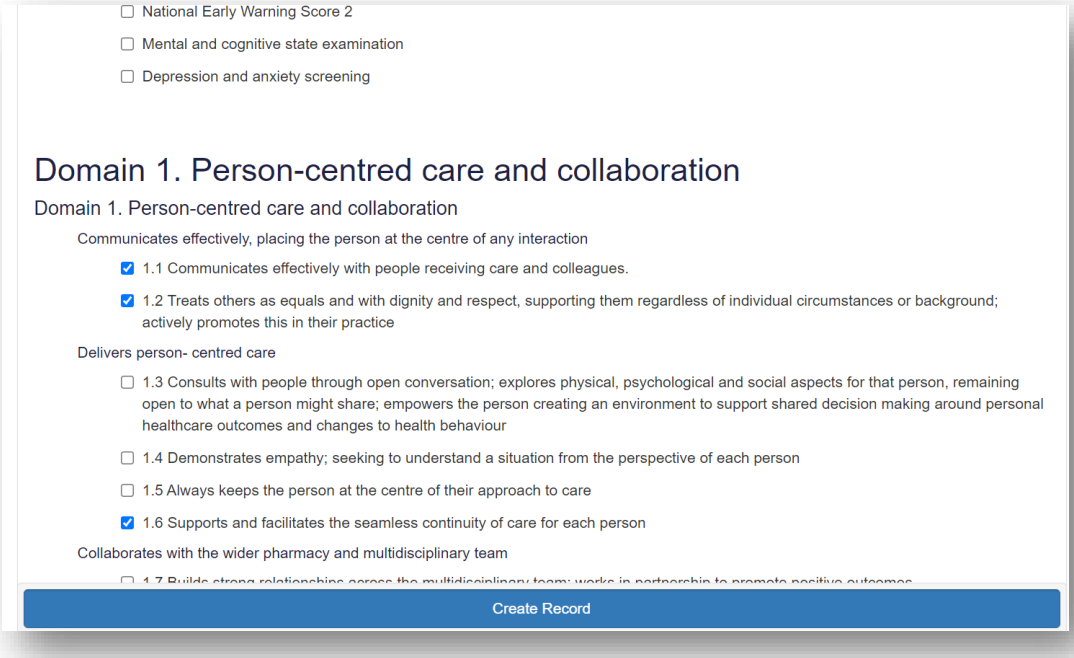
Continue and complete the rest of the form as instructed.

You will complete the "**What aspects were done well?**" and "**Suggested areas for development**" sections. You and your learner can complete the "**Agreed action(s)**" section. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.

If the Direct Observation of Practical Skills is for one of the clinical assessment skills that forms part of the curriculum requirements, you can map the form to the relevant **clinical assessment skill.** For more details about Clinical Assessment Skills please refer to **Section 9.**

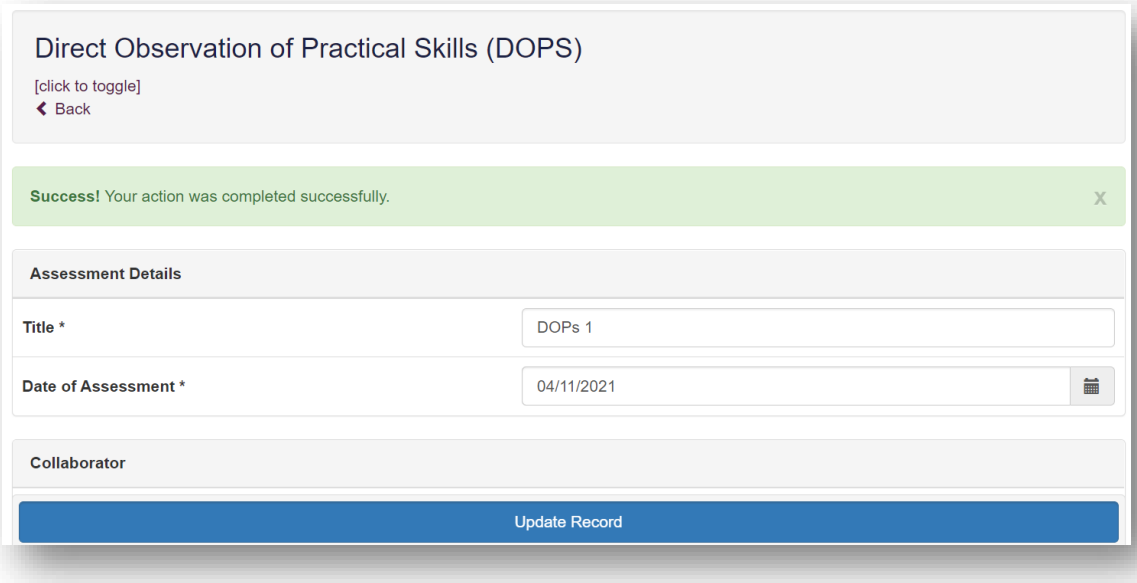



You should also consider what **outcomes** the “Direct Observation of Practical Skills” form provides evidence for, and map it to all that apply. Your learner can also complete the mapping sections.




When you have completed all the required fields, select “**Create Record**”.

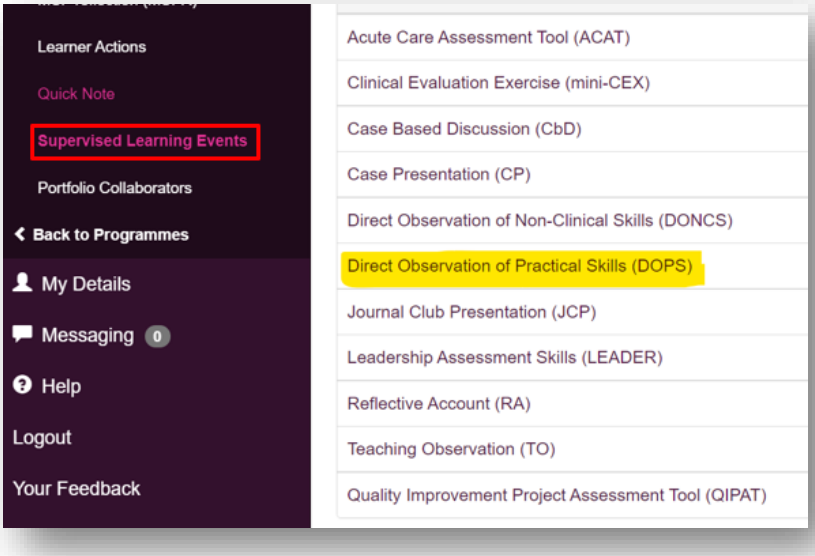
You will receive confirmation that the record has been saved and created.



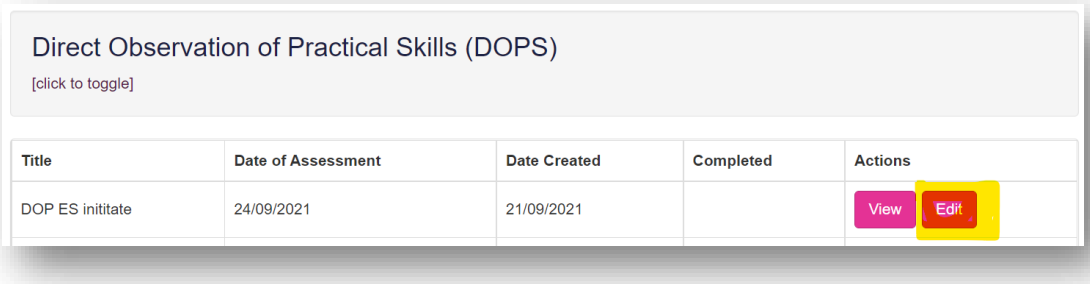

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.6.2 Reviewing a Direct Observation of Practical Skills

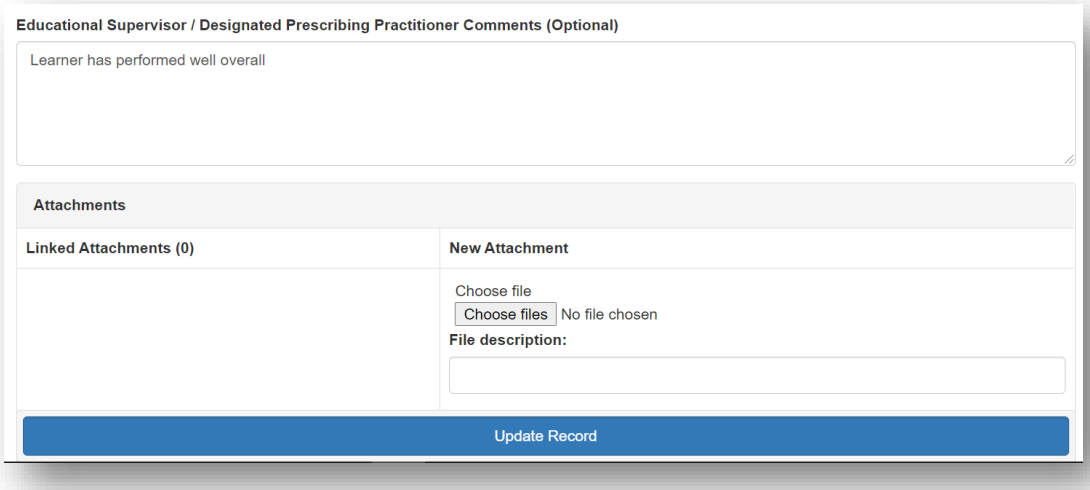
On the menu select "**Supervised Learning Events**" then "**Direct Observation of Practical Skills (DOPS)**" or select "**Direct Observation of Practical Skills (DOPS)**" from the dashboard.



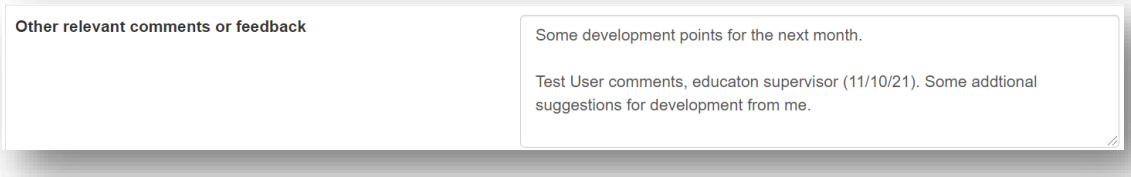

Select the record you want to review by clicking on "**Edit**" next to the record details.



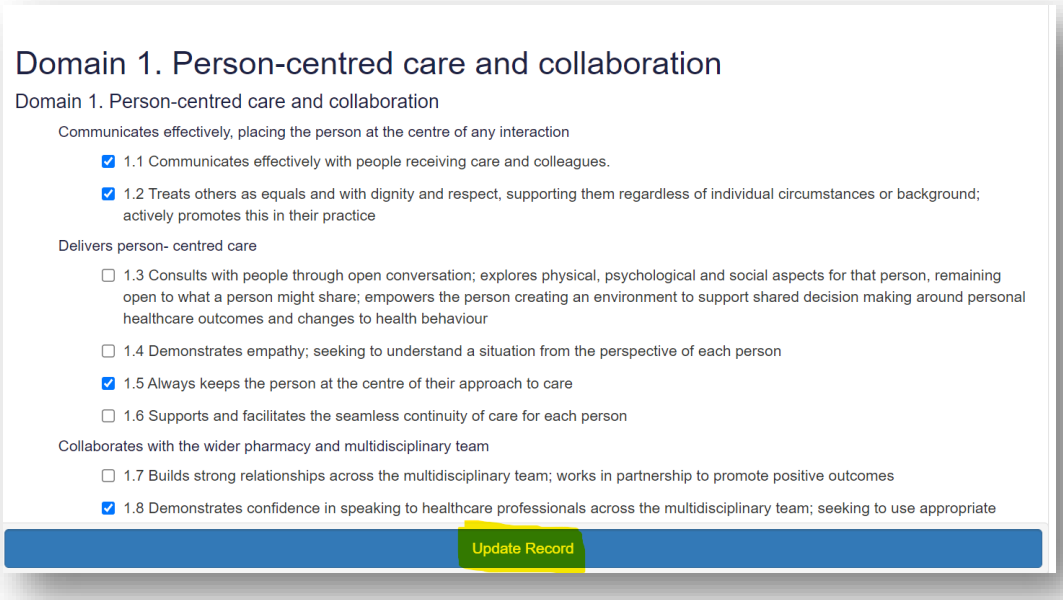

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



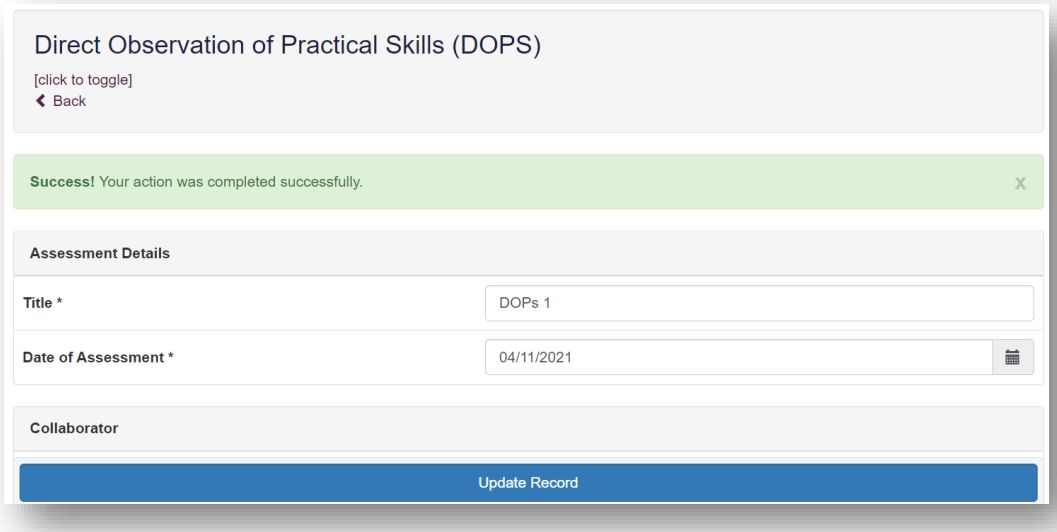
**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done, select "**Update Record**".




You will receive confirmation that the record has been updated



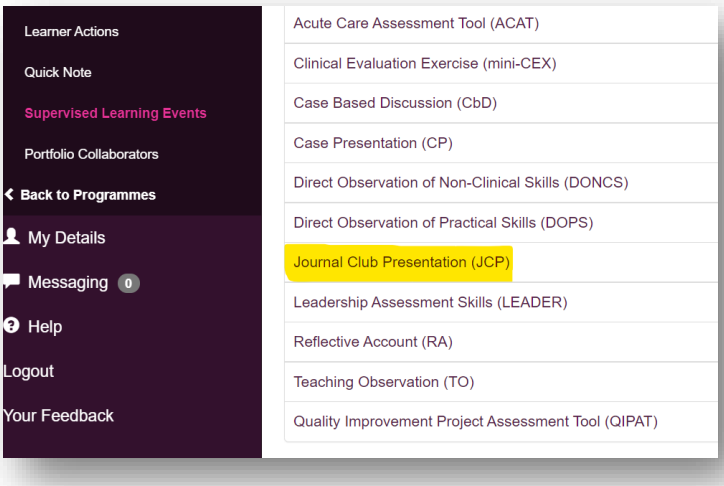

Your learner can then mark the record as complete.

## 8.7 Journal Club Presentation (JCP)

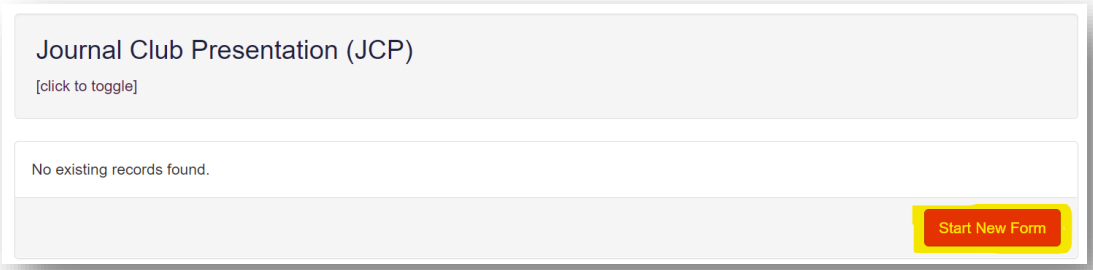
The tool is an evaluation of your leaner's ability to effectively present a journal paper to colleagues demonstrating knowledge of research methods and critical evaluation skills.

### 8.7.1 Creating and completing a Journal Club Presentation

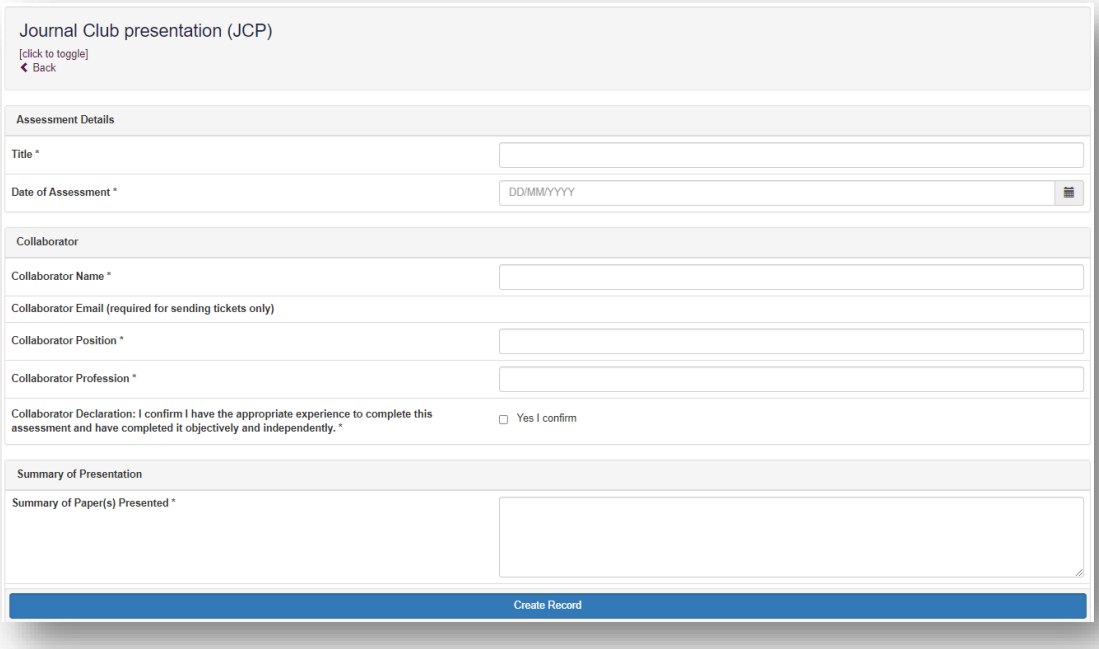
On the menu select "**Supervised Learning Events**" then "**Journal Club presentation (JCP)**" or select "**Journal Club presentation (JCP)**" from the dashboard.



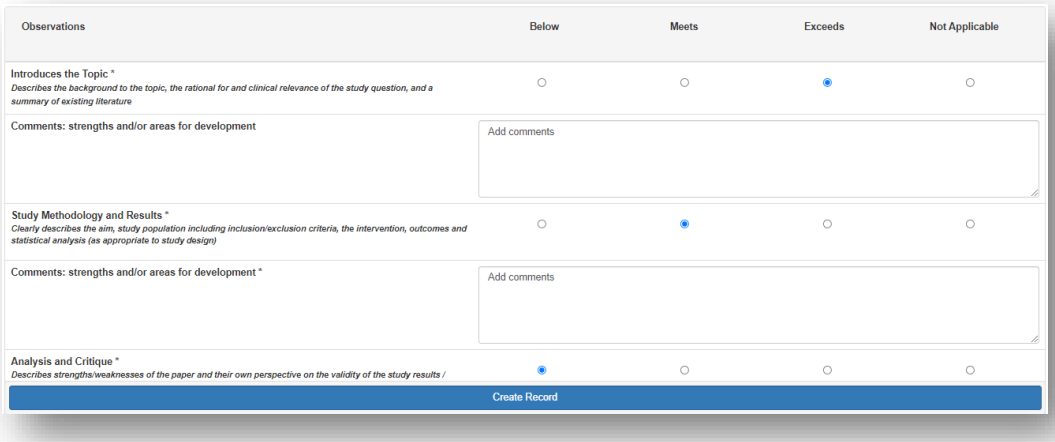
Select “**Start New Form**” to create a new record.




The ‘Journal Club Presentation’ form will appear. Completed the required fields as instructed.



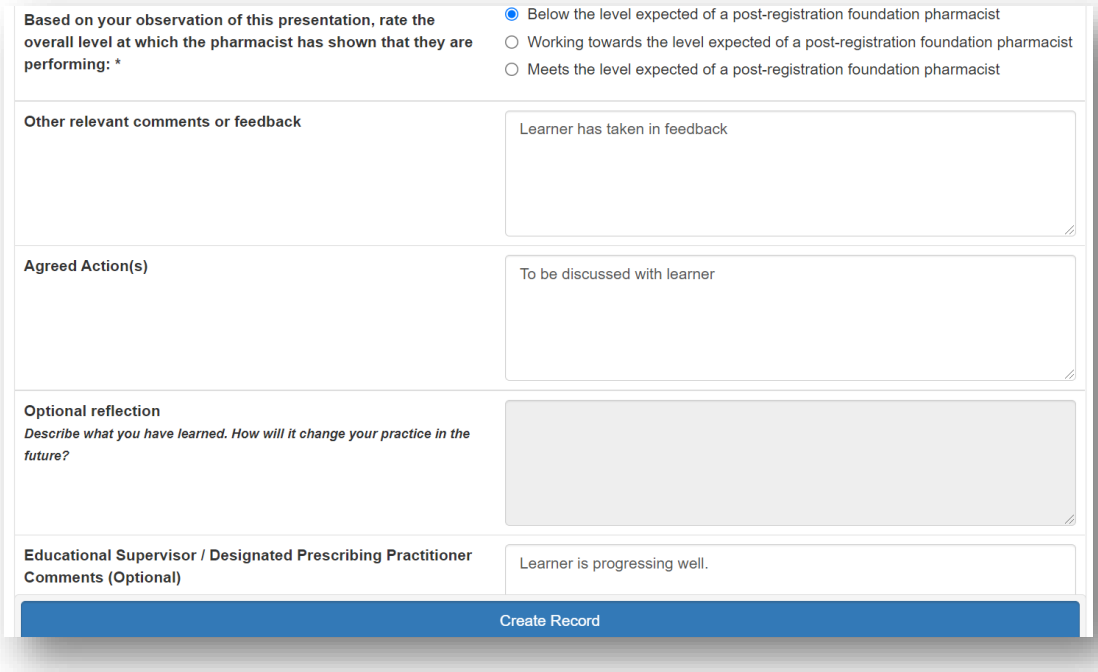

Please ensure you complete the ratings and comments fields.



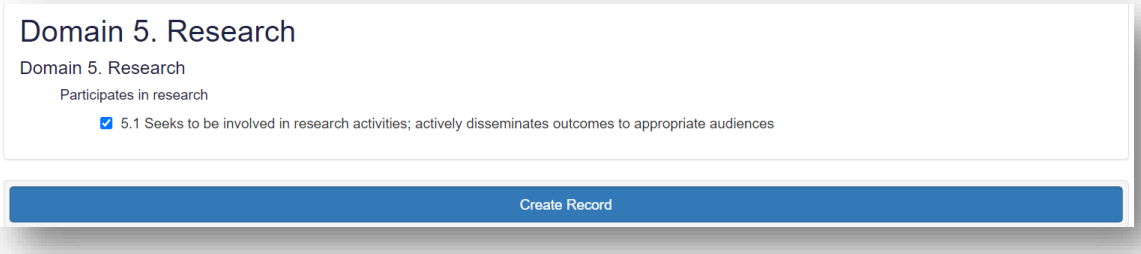
**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

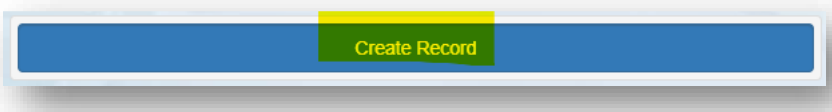
You will complete the "**Other relevant comments or feedback**". You and your learner can complete the "**Agreed action(s)**" section. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.




Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



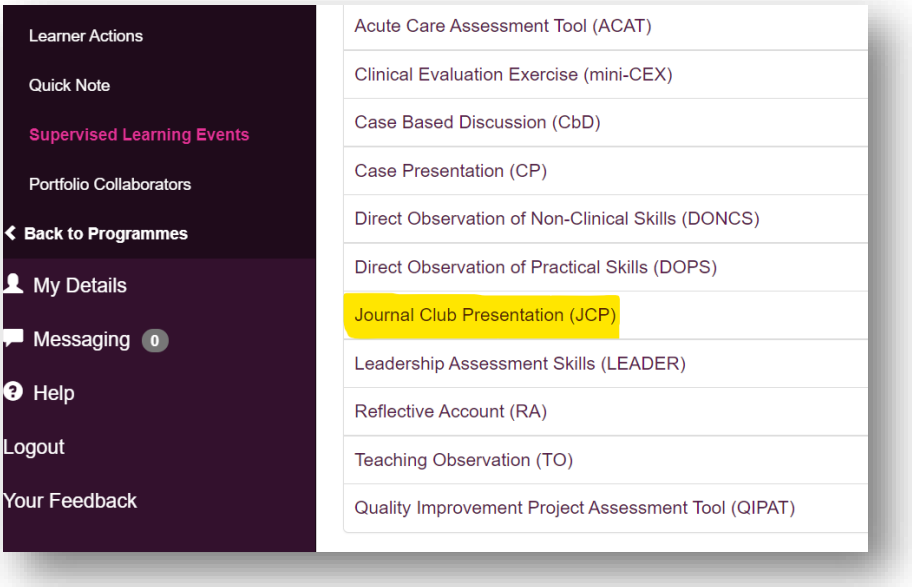
You will receive confirmation that the record has been saved and created.

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

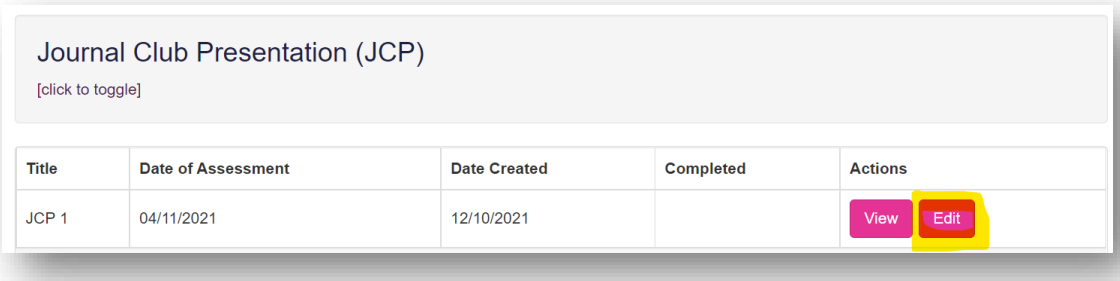
Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.7.2 Reviewing a Journal Club Presentation

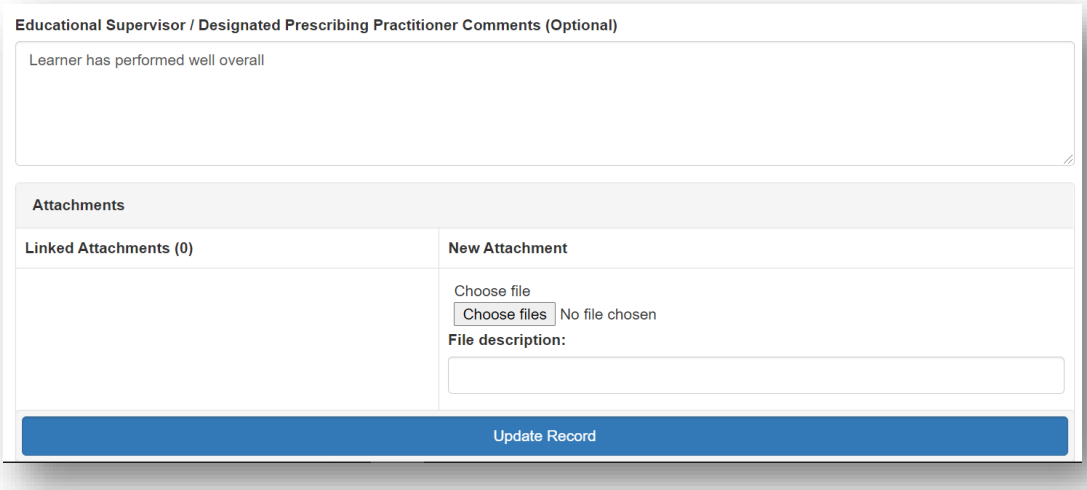
On the menu select "**Supervised Learning Events**" then "**Journal Club Presentation (JCP)**" or select "**Journal Club Presentation (JCP)**" from the dashboard.



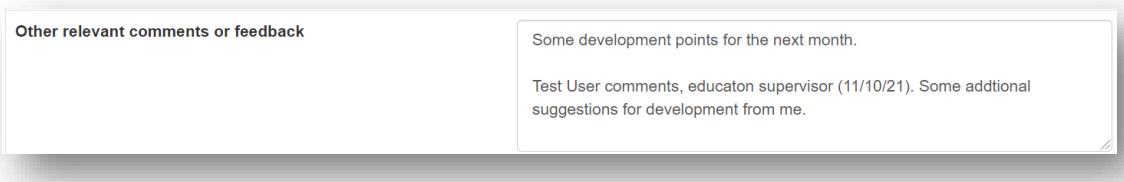
Select the record you want to review by clicking on “**Edit**” next to the record details.



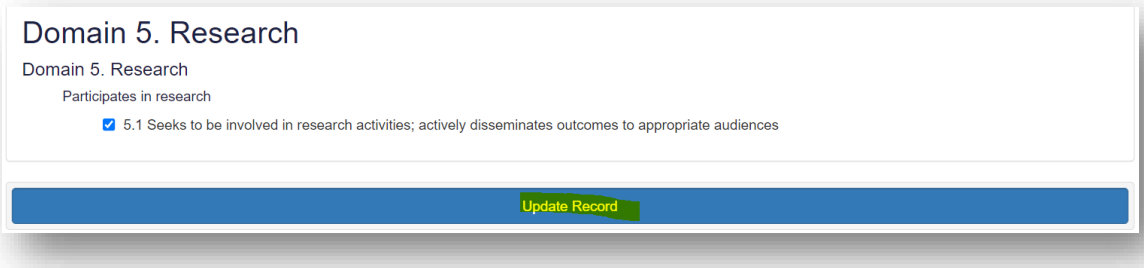

Review the fields, edit text as required and add in any relevant comments in the field for ‘Educational Supervisor/ Designated Prescribing Practitioner’.



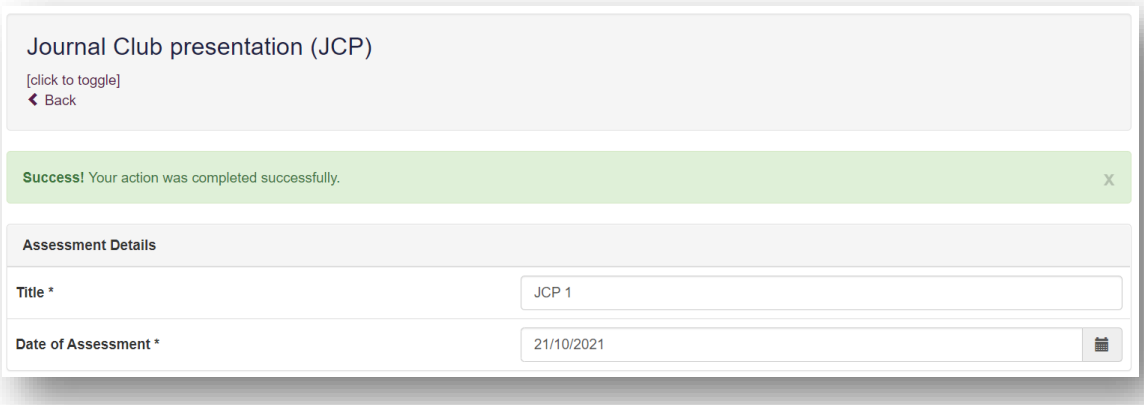

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example ‘[Name] comments, supervisor (dd/mm/yy): xxx’.




When done select “**Update Record**”.




You will receive confirmation that the record has been updated



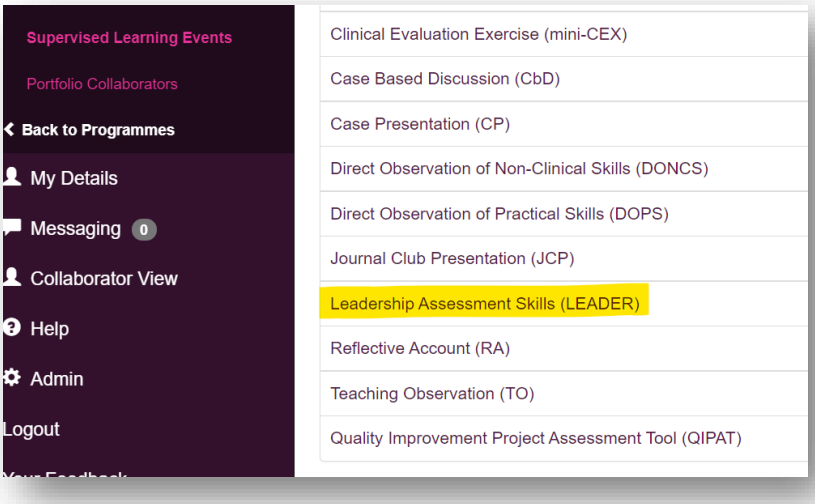

Your learner can then mark the record as complete.

## 8.8 Leadership Assessment Skills (LEADER)

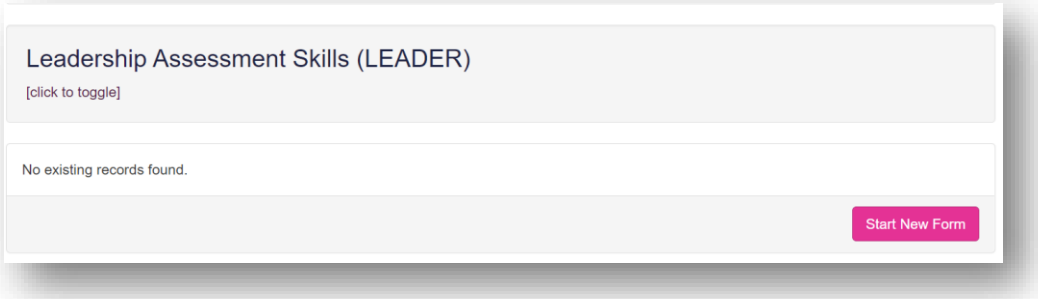
The tool is an evaluation of your learner's non-clinical leadership and team working capabilities.

### 8.8.1 Creating and completing a Leadership Assessment Skills

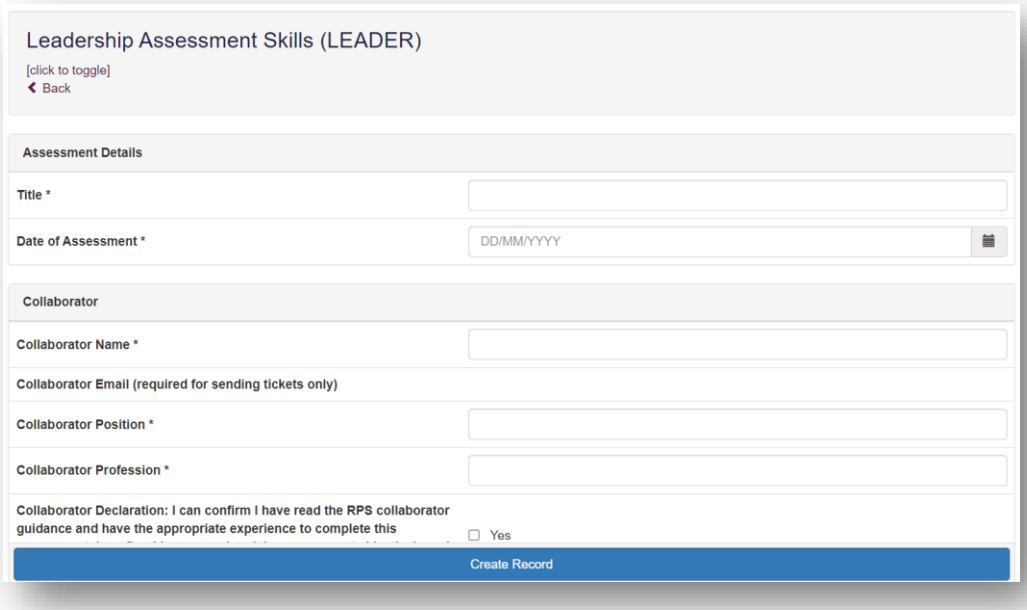
On the menu select "**Supervised Learning Events**" then "**Leadership Assessment Skills (LEADER)**" or select "**Leadership Assessment Skills (LEADER)**" from the dashboard.



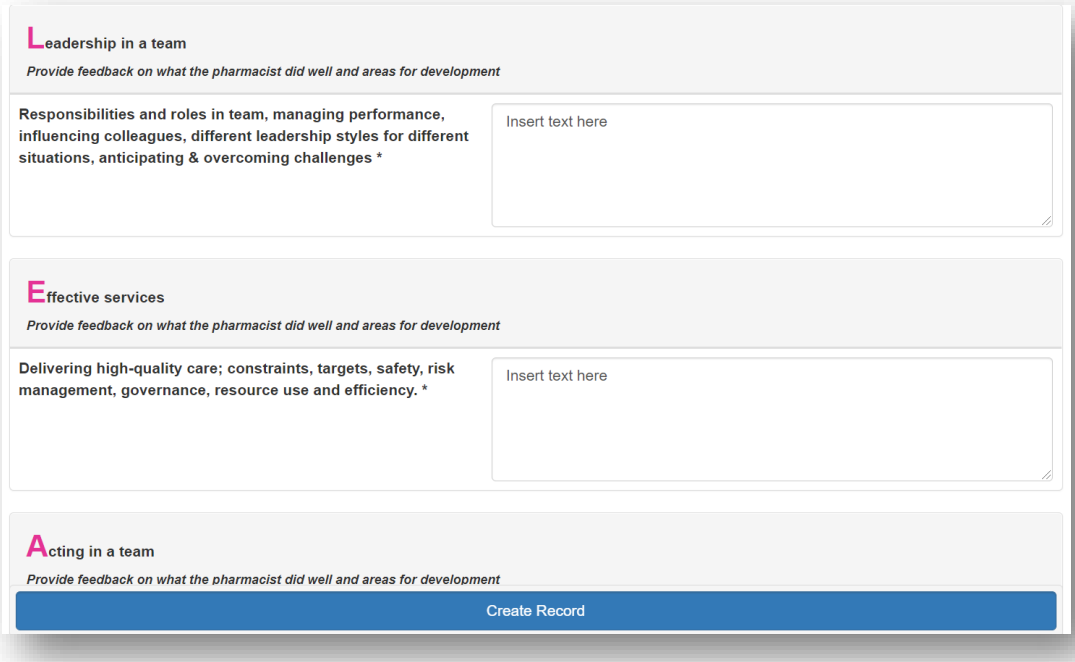

Select "**Start New Form**" to create a new record.




The 'Leadership Assessment Skills' form will appear. Complete the required fields as instructed.

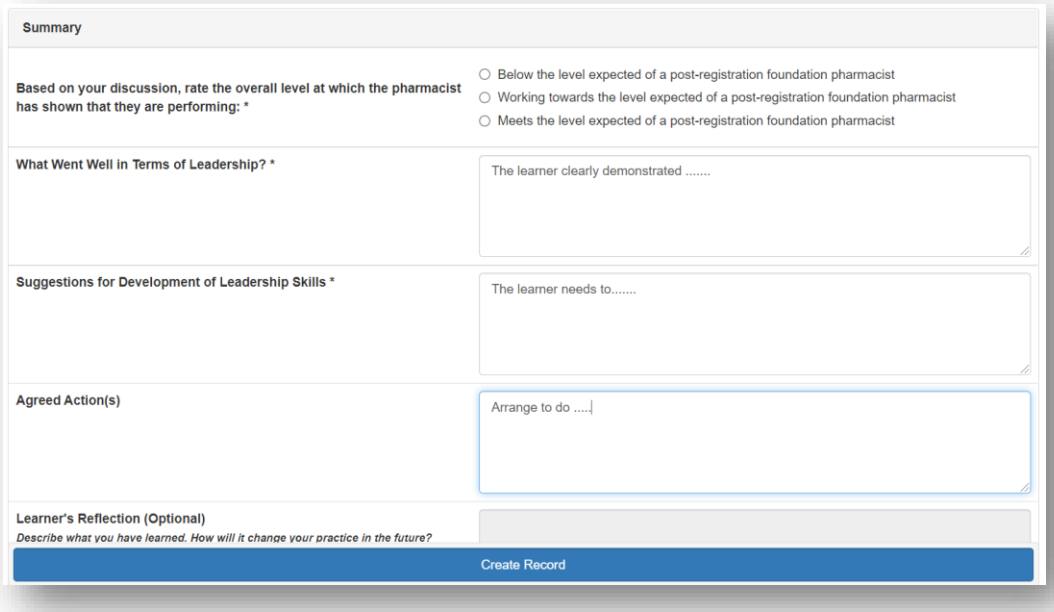



Continue and complete the rest of the form as instructed.

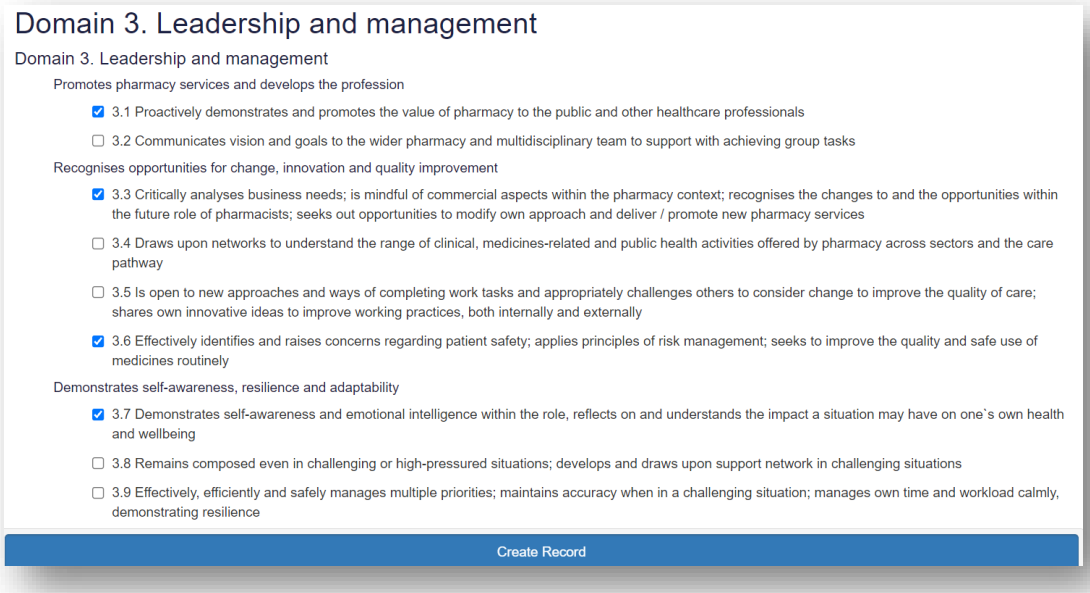



**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

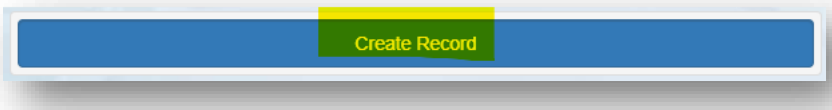
You will complete the "**What went well in terms of leadership**" and the "**Suggestions for development of leadership skills**" sections. You and your learner can complete the "**Agreed action(s)**" area. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



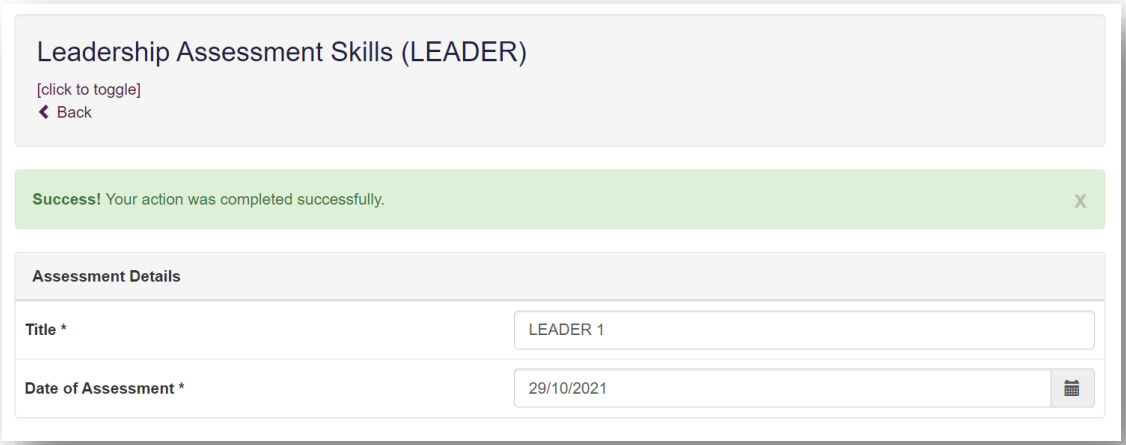

Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



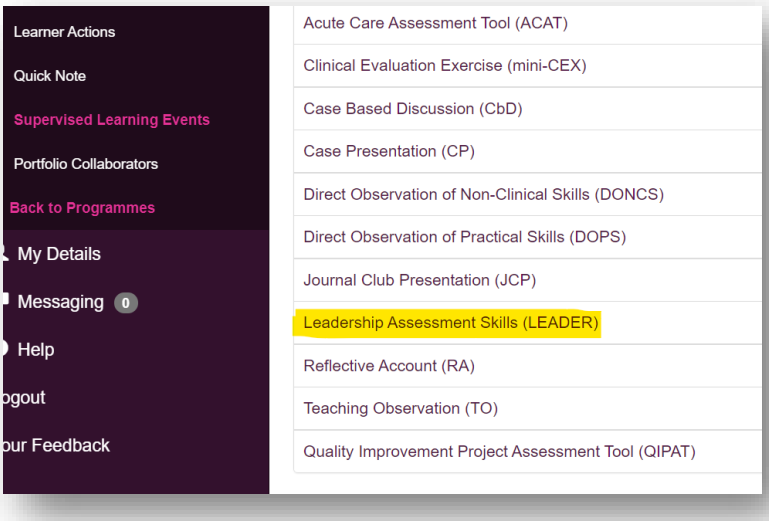

You will receive confirmation that the record has been saved and created.



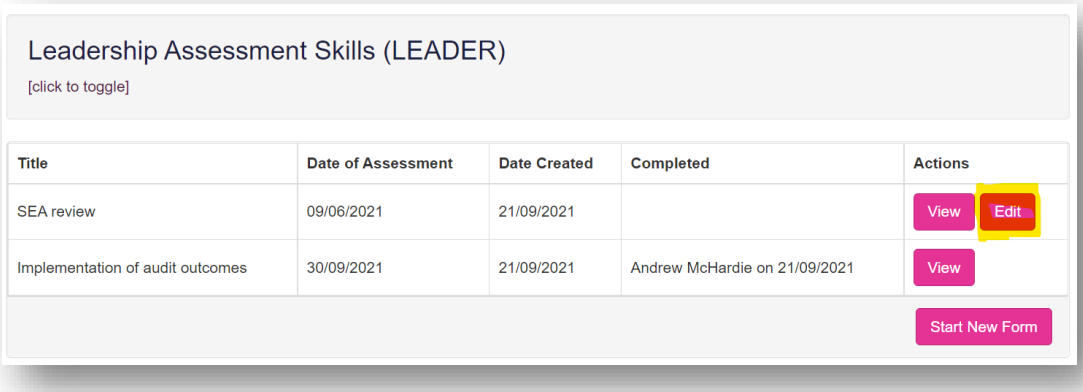

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.8.2 Reviewing a Leadership Assessment Skills

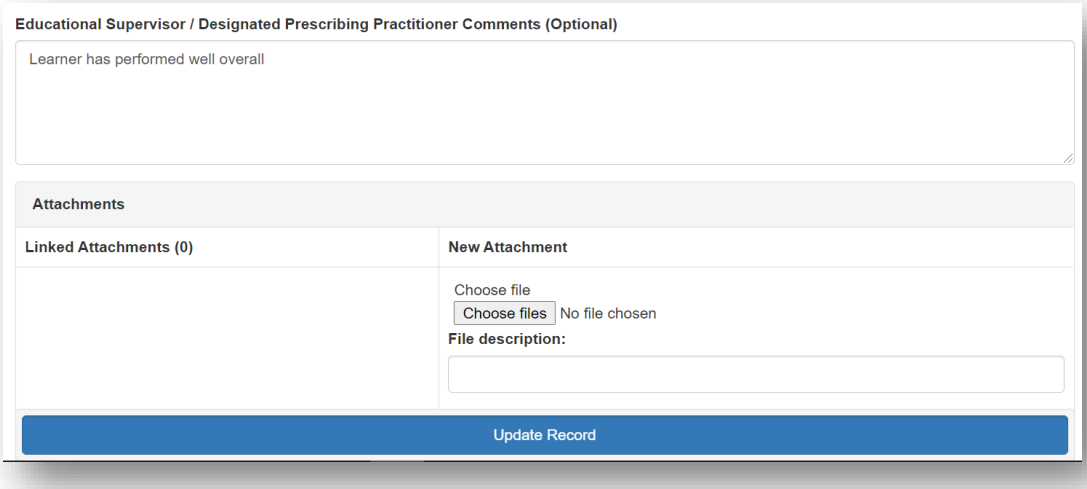
On the menu, select "**Supervised Learning Events"** then "**Leadership Assessment Skills (LEADER)**" or select "**Leadership Assessment Skills (LEADER)**" from the dashboard.



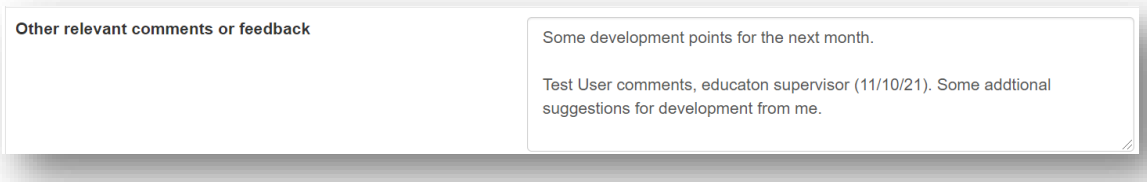

Select the record you want to review by clicking on "**Edit**" next to the record details.



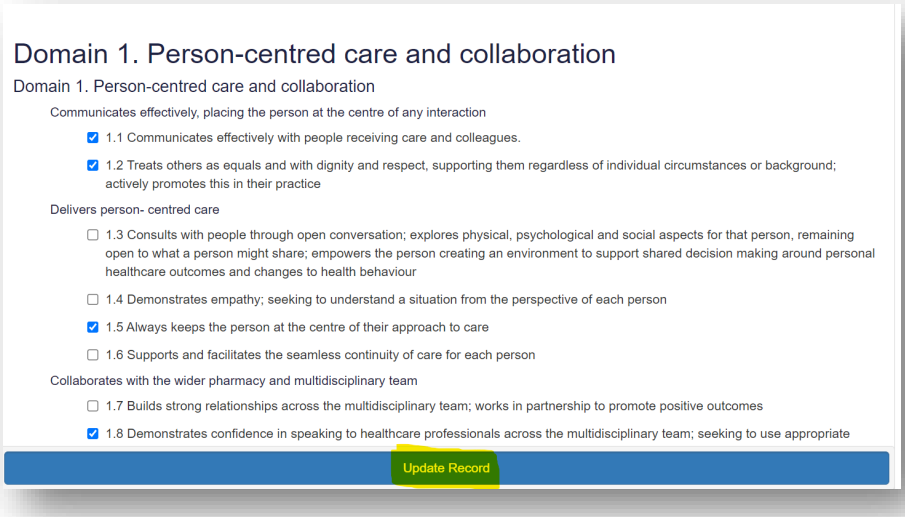

Review the fields, edit text as required and add in any relevant comments in the field for ‘Educational Supervisor/ Designated Prescribing Practitioner’.



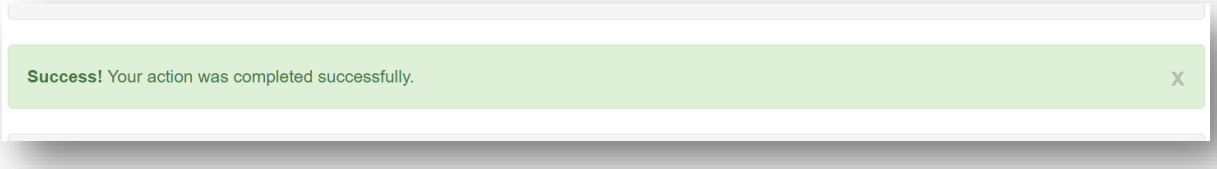

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example ‘[Name] comments, supervisor (dd/mm/yy): xxx’.




When done select “**Update Record**”.




You will receive confirmation that the record has been updated



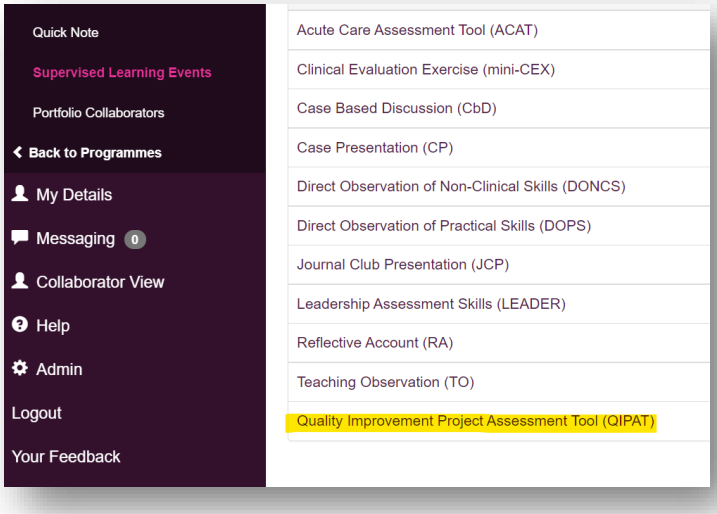

Your learner can then mark the record as complete.

## 8.9 Quality Improvement Project Assessment Tool (QIPAT)

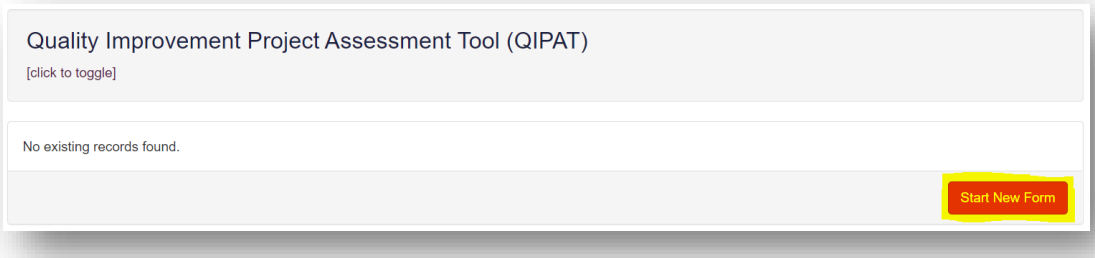
The tool is an evaluation of your learner's ability to undertake a quality improvement project to improve service provision in their area of expertise.

### 8.9.1 Creating or completing a Quality Improvement Project Assessment Tool

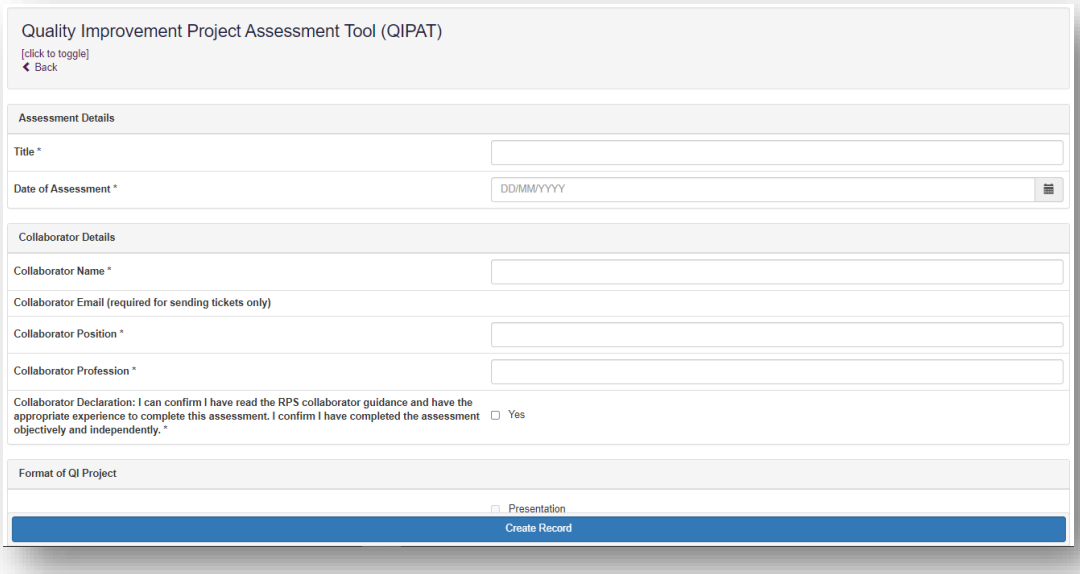
On the menu select "**Supervised Learning Events**" then "**Quality Improvement Project Assessment Tool (QIPAT)**" or select then "**Quality Improvement Project Assessment Tool (QIPAT)**" from the dashboard.



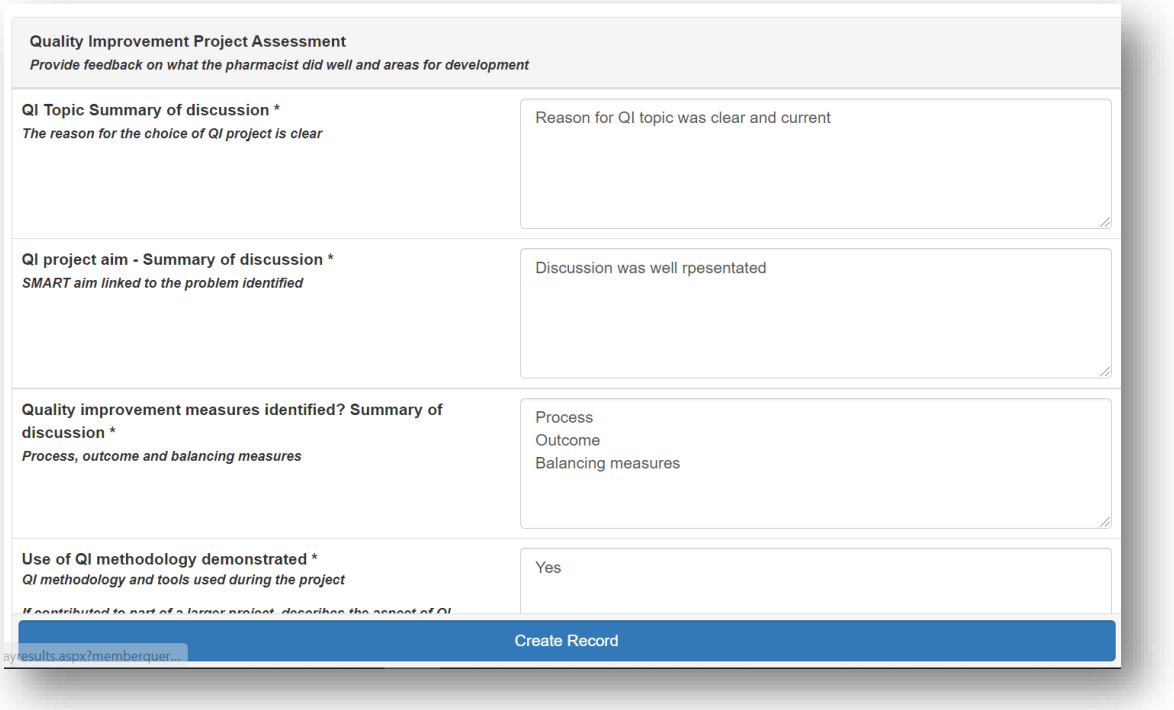

Select “**Start New Form**” to create a new record.




The ‘Quality Improvement Project Assessment Tool’ form will appear. Complete the required fields as instructed.



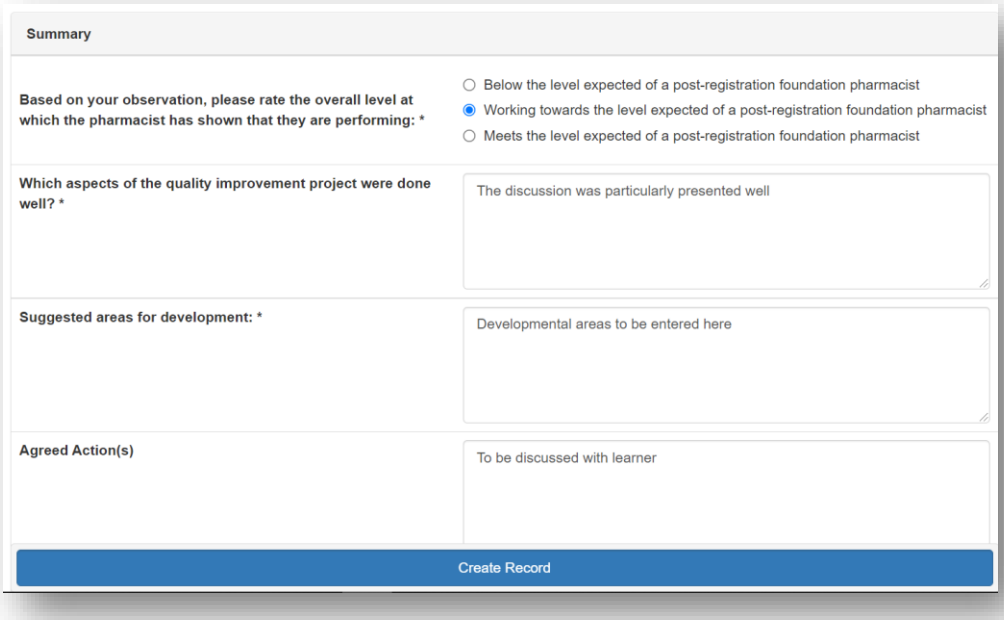
Please ensure you complete the ratings and comments fields.



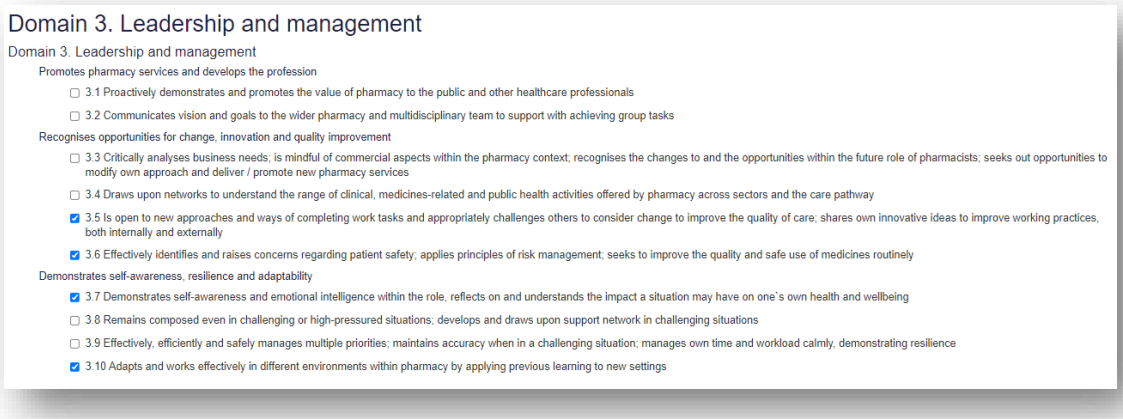

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

You will complete the "**Which aspects of the quality improvement project were done well?**" and the "**Suggested areas for improvement**" sections. You and your learner can complete the "**Agreed action(s)**" section. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.

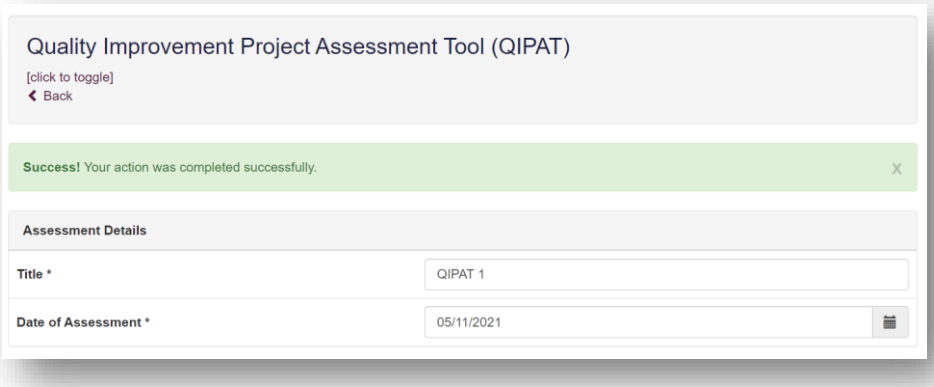



Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".

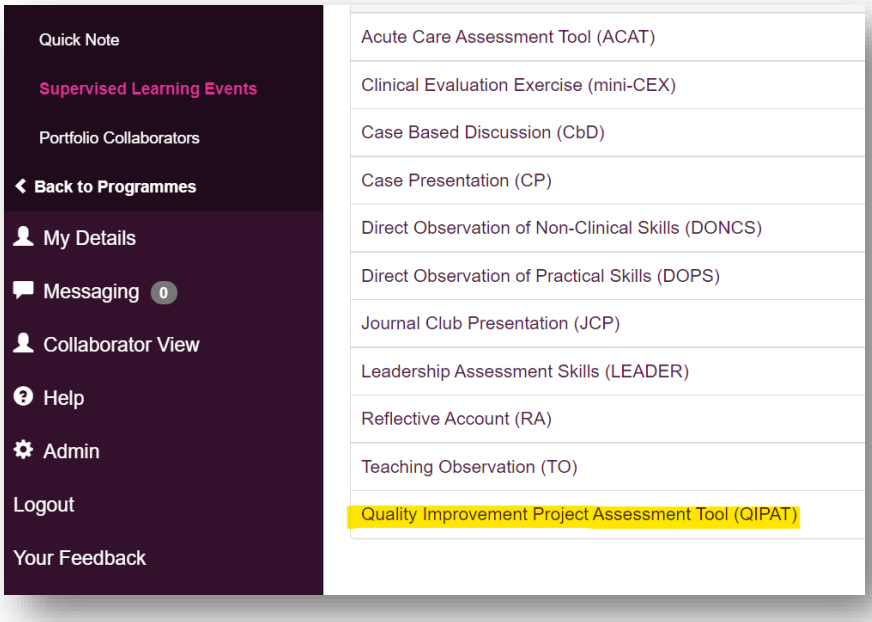
You will receive confirmation that the record has been saved and created.



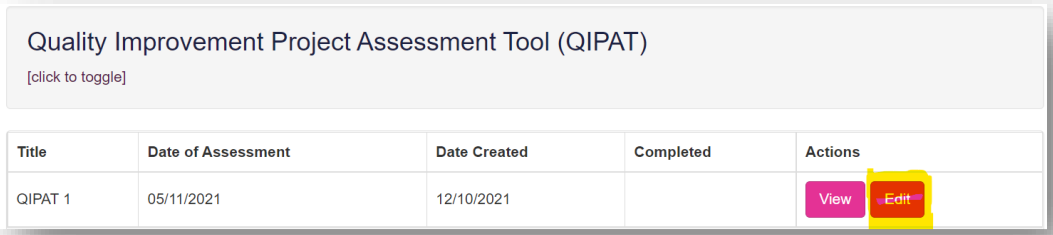

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.9.2 Reviewing a Quality Improvement Assessment Tool

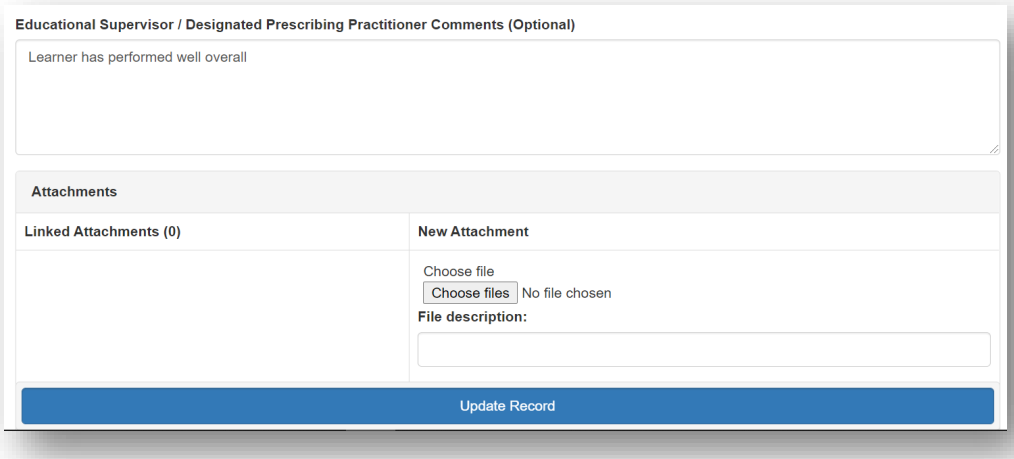
On the menu select "**Supervised Learning Events**" then "**Quality Improvement Project Assessment Tool (QIPAT)**" or selecting "**Quality Improvement Project Tool (QIPAT)**" from the dashboard.



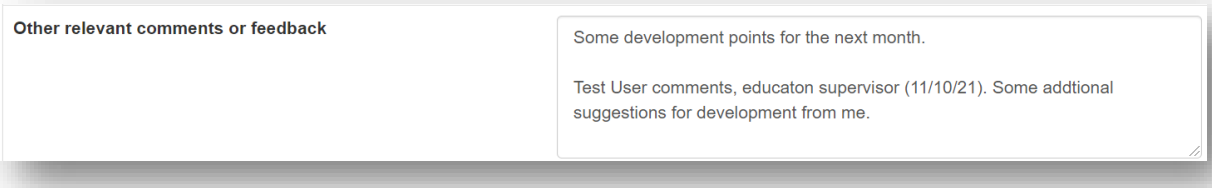

Select the record you want to review by clicking on "**Edit**" next to the record details.



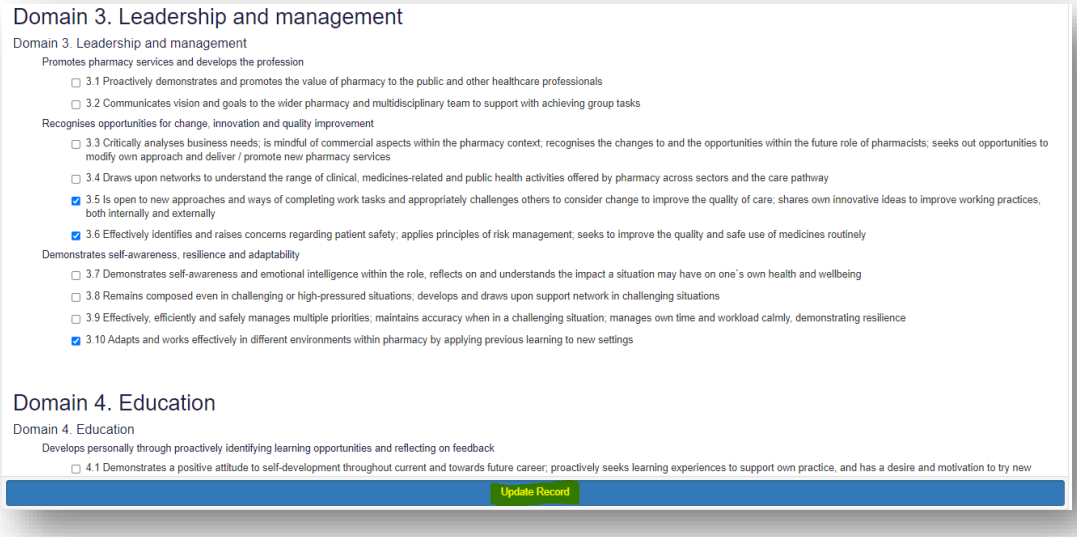

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



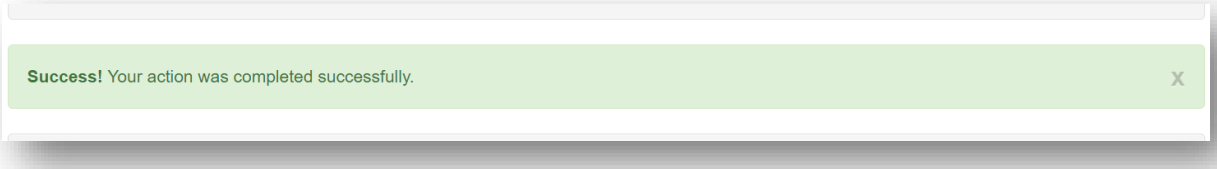

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".




You will receive confirmation that the record has been updated




Your learner can then mark the record as complete.

## 8.10 Reflective Account (RA)

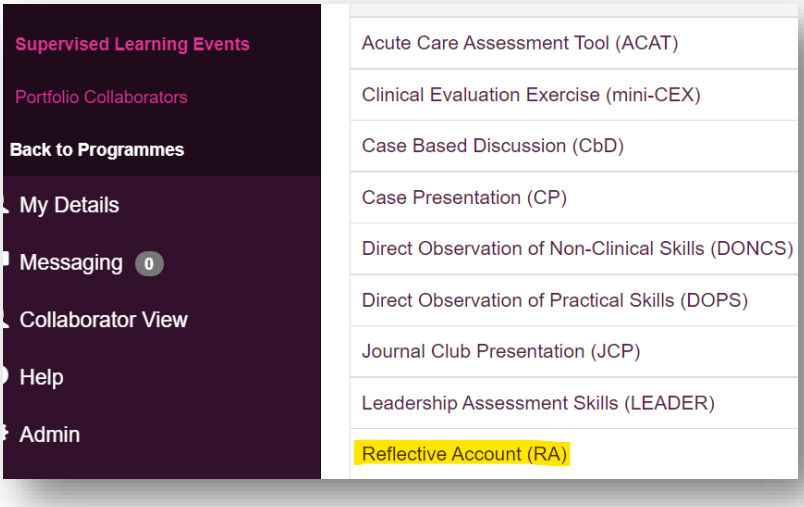
The purpose of the reflective account is to provide an opportunity for your learner to think and consider analytically anything relating to their professional practice. It should be a brief, written description of their experience and actions, including what went well and reflecting on what could be improved, and how lessons learnt will benefit your development as well as patients and the public.

They can use the reflective account tool to capture how they are meeting the learning outcomes across one or more activities undertaken. It has been designed to be flexible so it can be used for most situations and practice scenarios, for example encounters during day-to-day work, patient scenarios, non-clinical tasks/activities, reviewing feedback provided by colleagues, critical incidents, and learning events, e.g. continuing professional development.

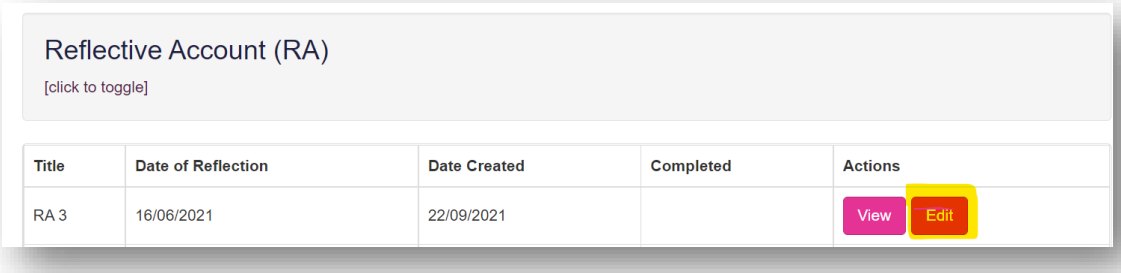
### 8.10.1 Reviewing a reflective account

You will not be able to initiate a Reflective Account, you only have permission to review a Reflective Account which has been started by your learner.

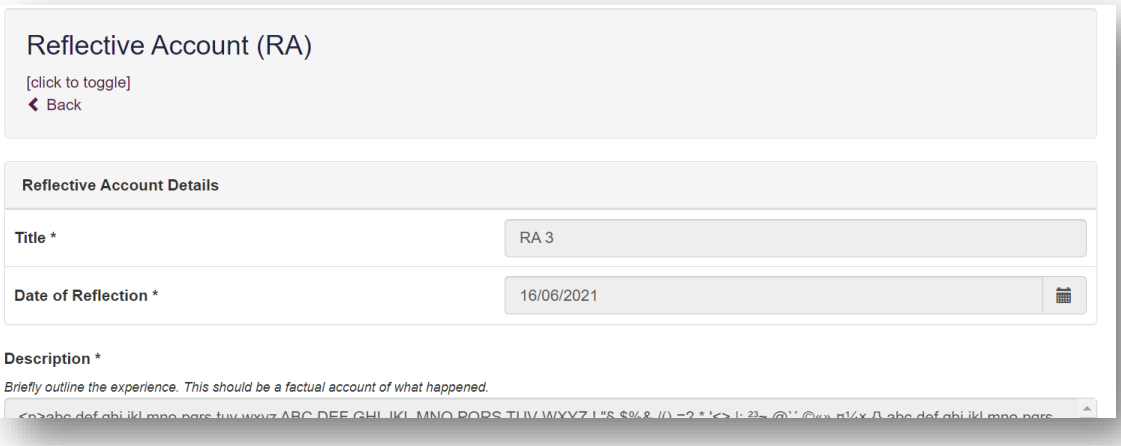
To review a Reflective Account, on the menu select "**Supervised Learning Events**" then "**Reflective Account (RA)**" or select "**Reflective Account (RA)**" from the dashboard.



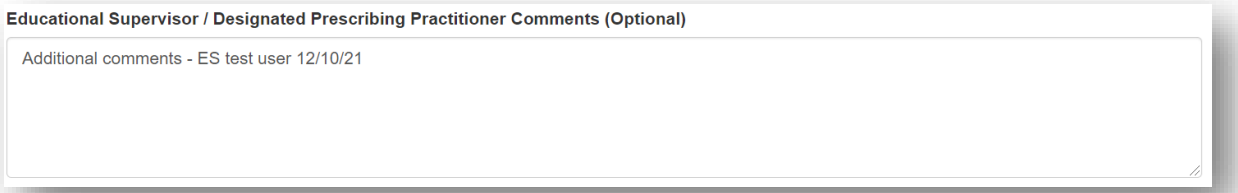

Select the Reflective Account you wish to view or edit. To add comments to the form, click '**Edit**'.




The form will appear. Review the fields.

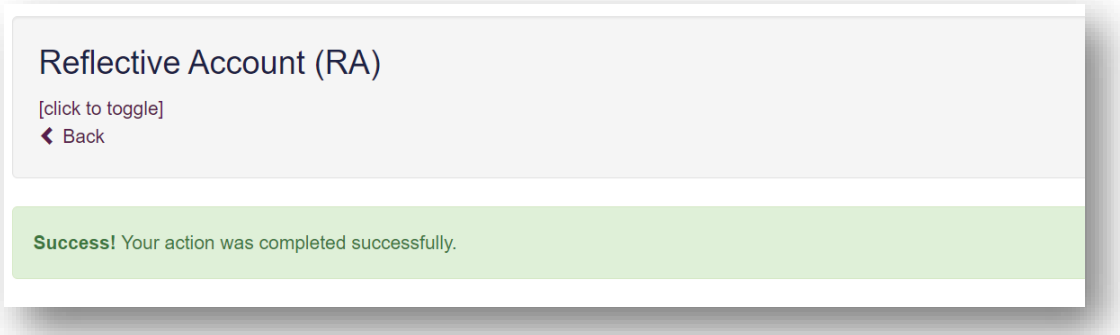


You can add comments to the ‘Educational Supervisor / Designated Prescribing Practitioner Comments’ box.




Once completed, select, ‘**Update Record’** to save.

You’ll receive confirmation that your record has been updated.

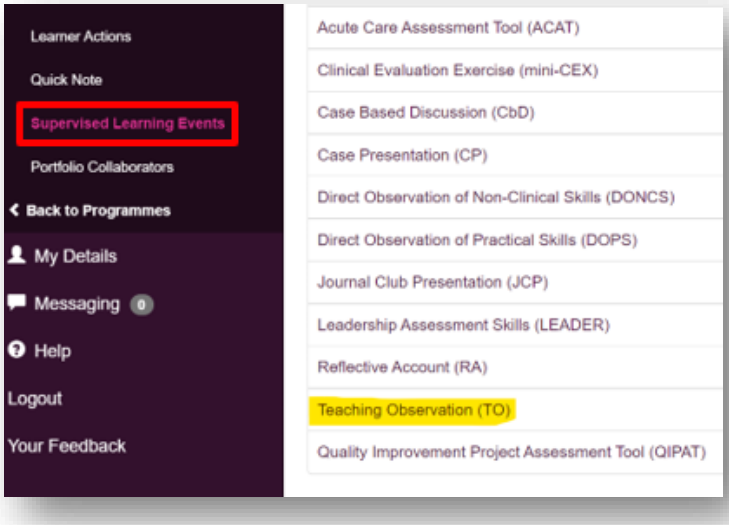



## 8.11 Teaching Observation (TO)

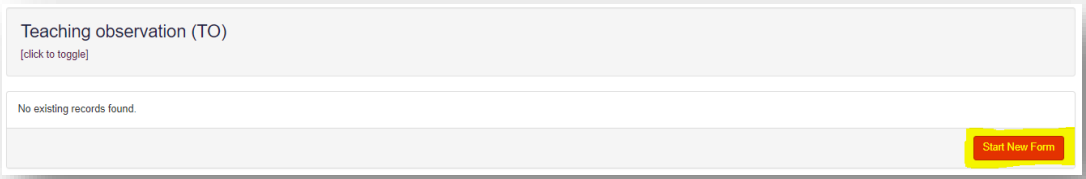
The tool is an evaluation of your learner’s ability to deliver an effective learning experience to others.

### 8.11.1 Creating and completing a Teaching Observation

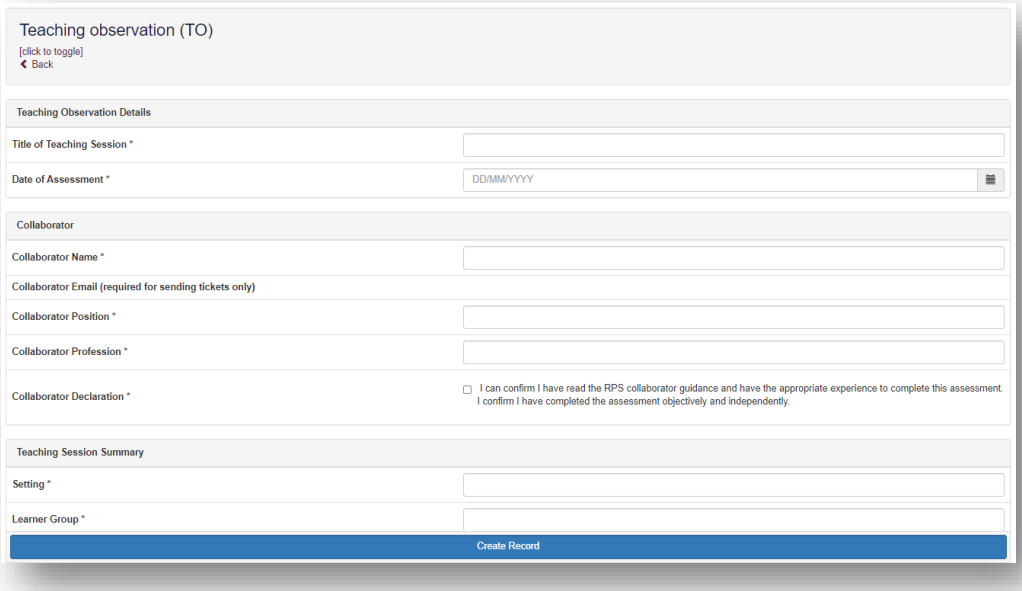
On the menu select “**Supervised Learning Events**” then “**Teaching Observation (TO)**” or select “**Teaching Observation (TO)**” from the dashboard.



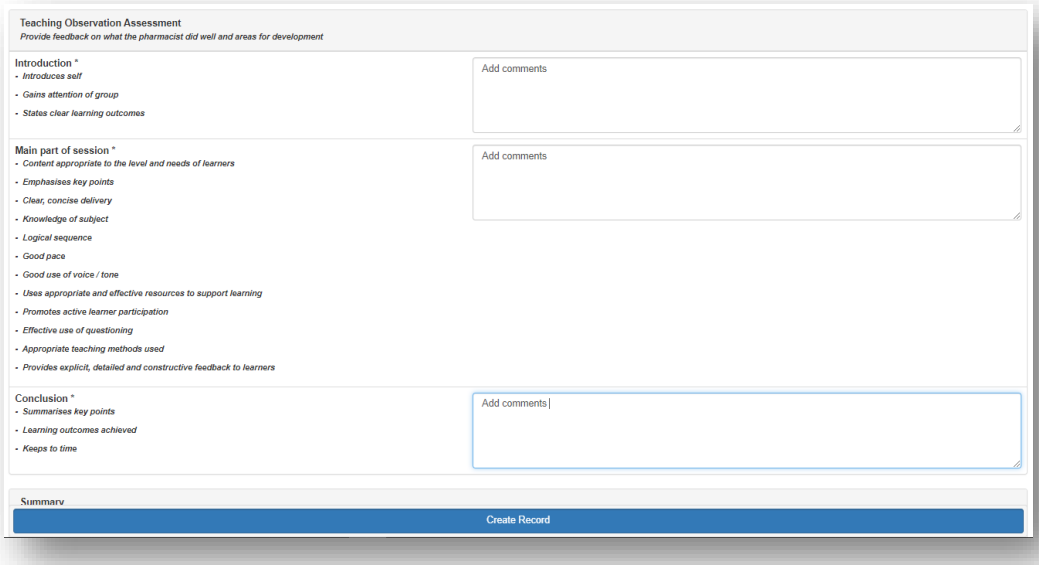

Select “**Start New Form**” to create a new record.




The ‘Teaching Observation’ form will appear. Completed the required fields as instructed.



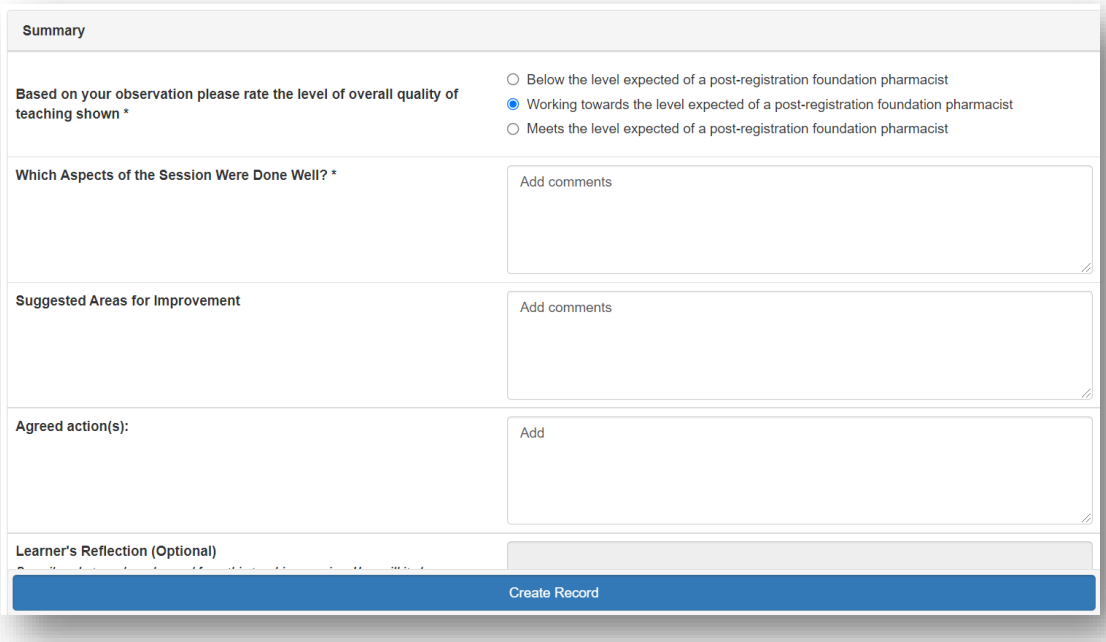

Please ensure you complete the ratings and comments fields.



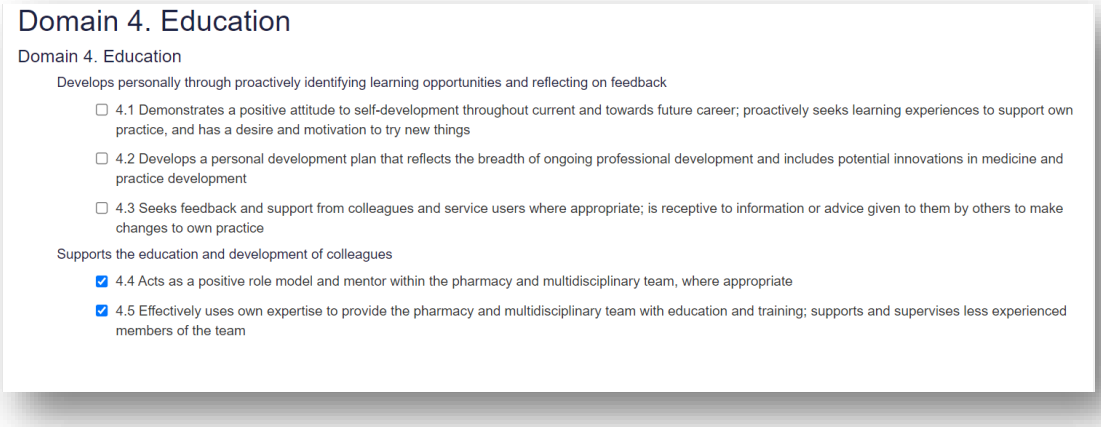

**NOTE**: There will be sections that you will not be able to edit as they are for learners to complete.

Continue and complete the rest of the form as instructed.

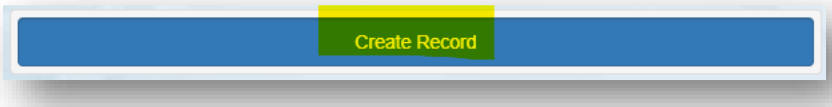
You will complete the "**Which aspects of the session were done well**" and "**Suggested areas for improvement**" sections. You and your learner can complete the "**Agreed action(s)**" section. Details inputted in the "**Agreed action(s)**" section will create an action that will appear in the "**Learner Actions"** section.



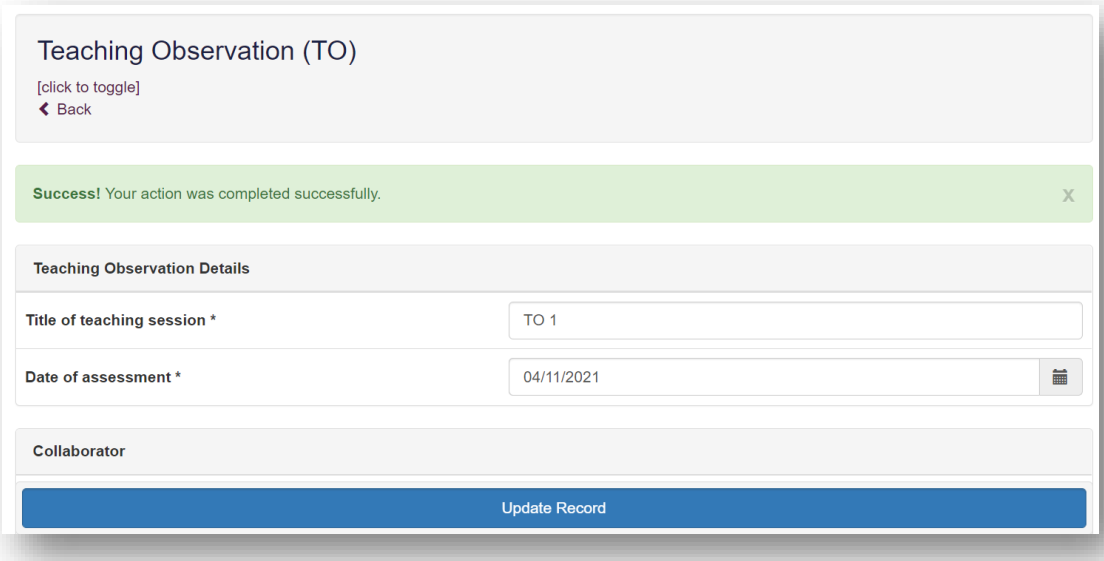
Remember to complete the framework mapping relevant to the record. Your learner can also complete this section.




When you have completed all the required fields, select "**Create Record**".



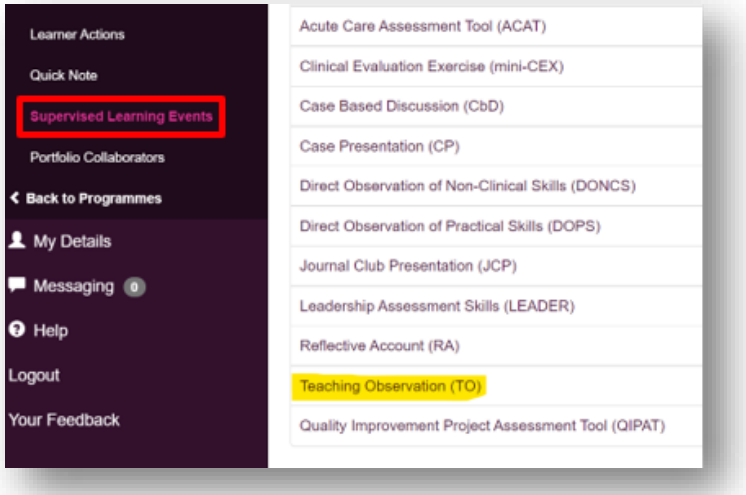

You will receive confirmation that the record has been saved and created.



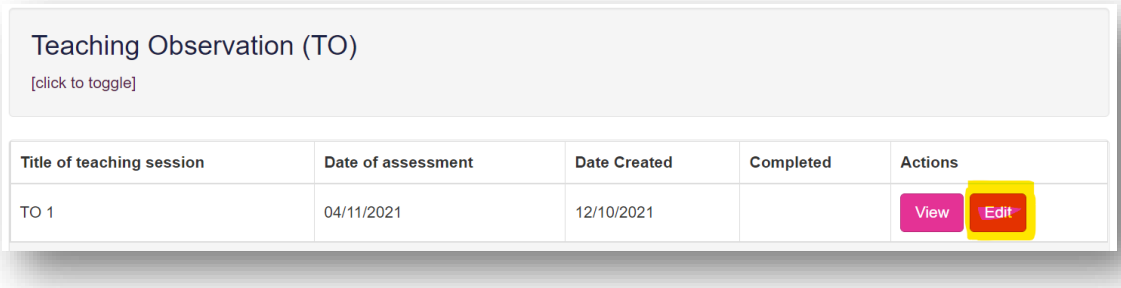

Your learner can then add some optional reflection if they wish to before they mark the form as complete.

### 8.11.2 Reviewing a Teaching Observation

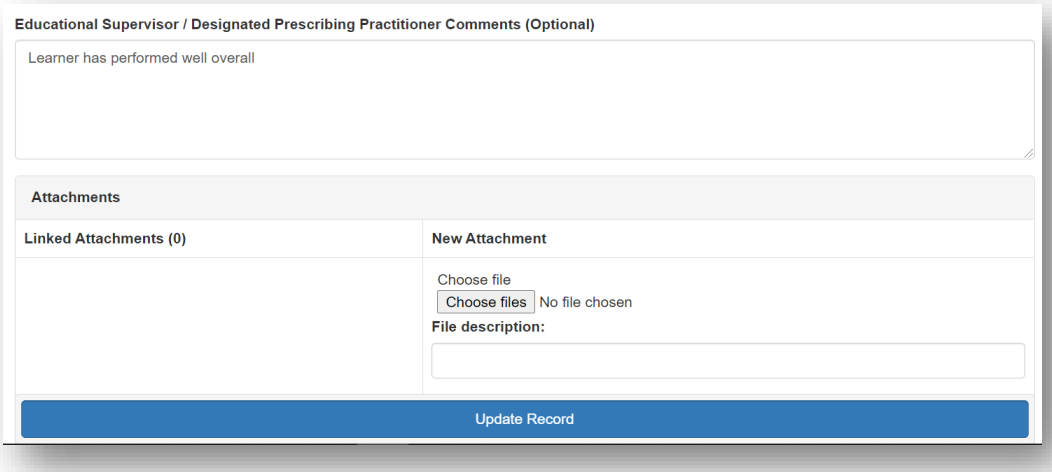
On the menu select "**Supervised Learning Events**" then "**Teaching Observation (TO)**" or select **"Teaching Observation (TO)"** from the dashboard.



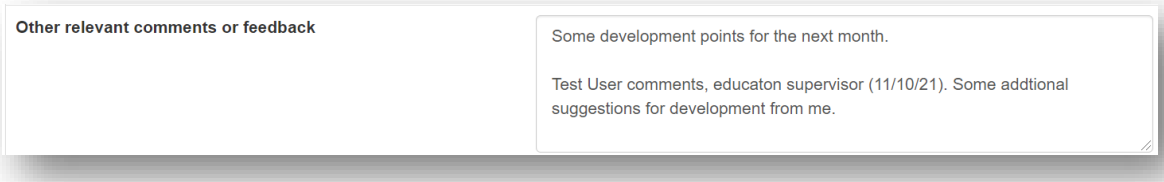

Select the record you want to review by clicking on "**Edit**" next to the record details.



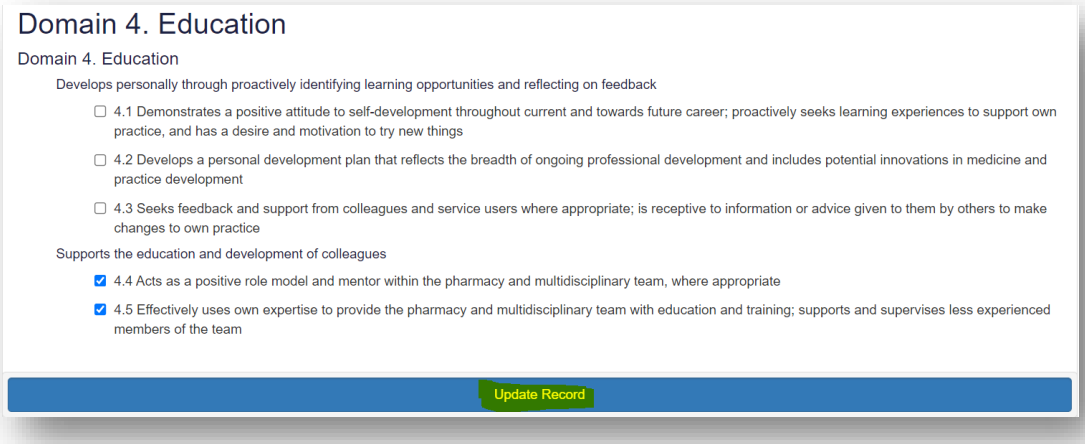

Review the fields, edit text as required and add in any relevant comments in the field for 'Educational Supervisor/ Designated Prescribing Practitioner'.



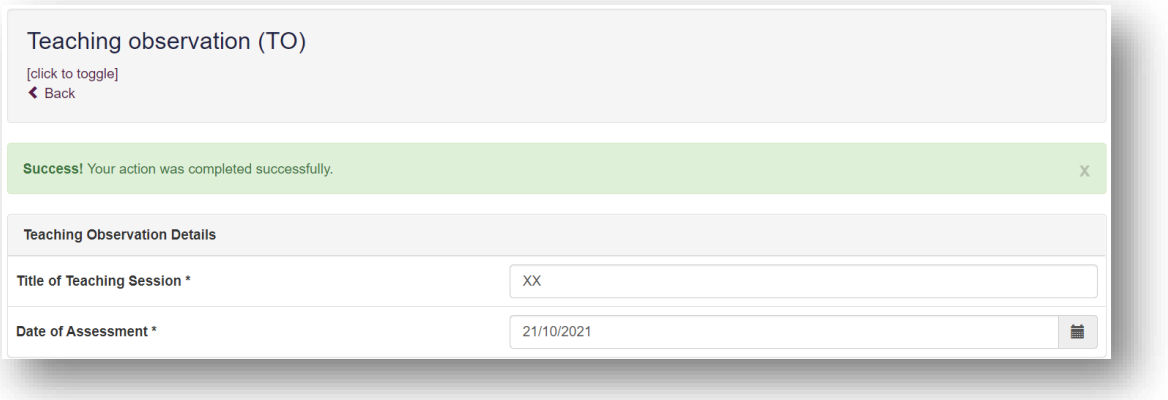

**TIP**: For some of the fields, you will be able to overwrite text that has been inputted by your learner or a ticketed collaborator, so take care that you do not delete any essential information. We recommend that when you edit or add text to a completed field to add your name and the date, for example '[Name] comments, supervisor (dd/mm/yy): xxx'.




When done select "**Update Record**".



You will receive confirmation that the record has been updated.




Your learner can then mark the record as complete.

## 8.12 Multi-source feedback (MSF)

The tool evaluates your learners' ability to reflect on and identify areas of development based on multi-source feedback. They can use it to collect feedback on professional and clinical performance from the pharmacy and wider multi-professional team.

They must invite at least **three colleagues** to provide feedback; this ensures that the feedback they receive will be of value. Colleagues who can provide feedback on their practice include senior pharmacists, other pharmacy colleagues, healthcare colleagues, and other individuals they work with who can comment on their current practice.

There is no limit on the number of colleagues that can be invited to provide feedback, but learners should aim to seek feedback from ideally 10-12 colleagues - the more the better.Even if less than three colleagues provide feedback, the report will not be deleted and can still be used.

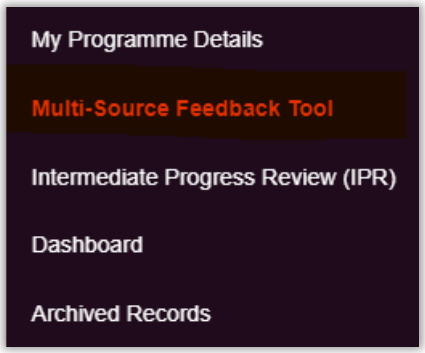
**NOTE**: The process only gives colleagues 30 days to provide feedback. The learner will also have the option to extend this by an additional 30 days if they require more time. However, if colleagues do not provide feedback within the set timeframe, they will not be able to complete the process after the deadline.

### 8.12.1 Initiating the multi-source feedback process

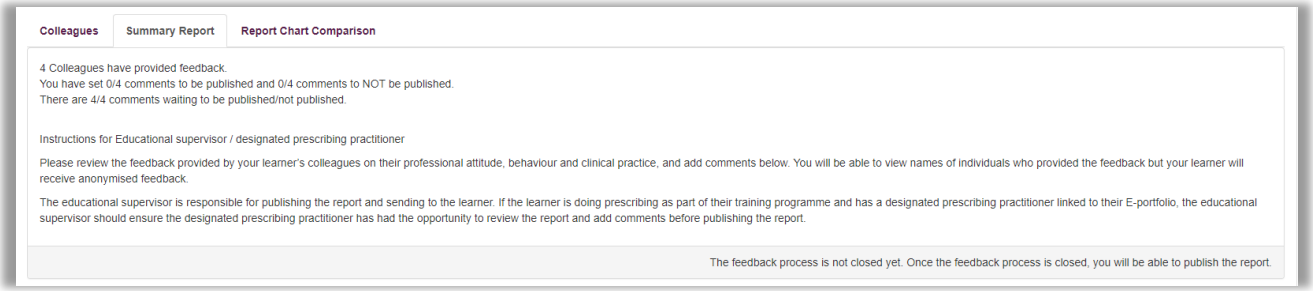
The Multi-Source Feedback Tool is initiated by the learner and will not be available for you to view until they have started the process. When initiating the process, your learner will nominate colleagues that they wish to receive feedback from, and complete a self-assessment of their practice.

## 8.12.2 Reviewing your learner's feedback

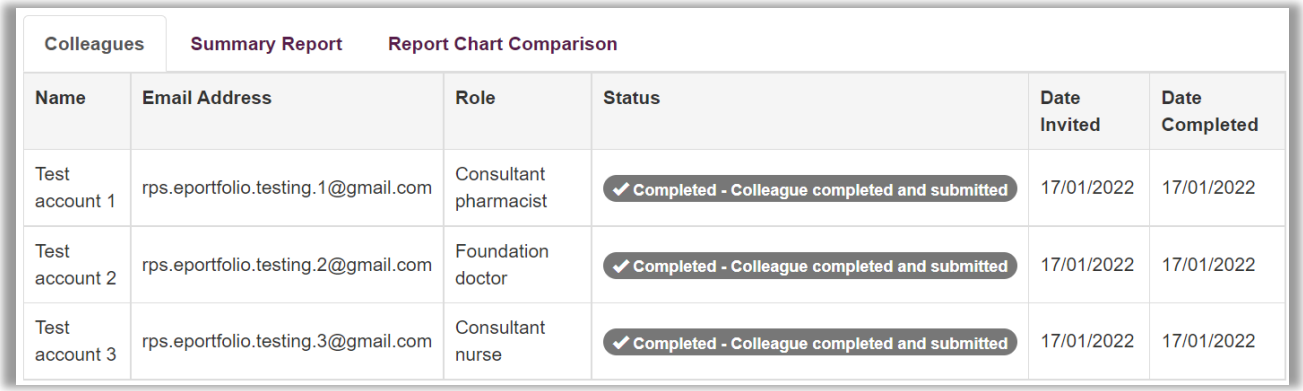
When colleagues provide feedback, this feedback will become available to you by navigating to your learner's E-portfolio, and then clicking on the "Multi-Source Feedback Tool" option in the left-hand navigation menu.



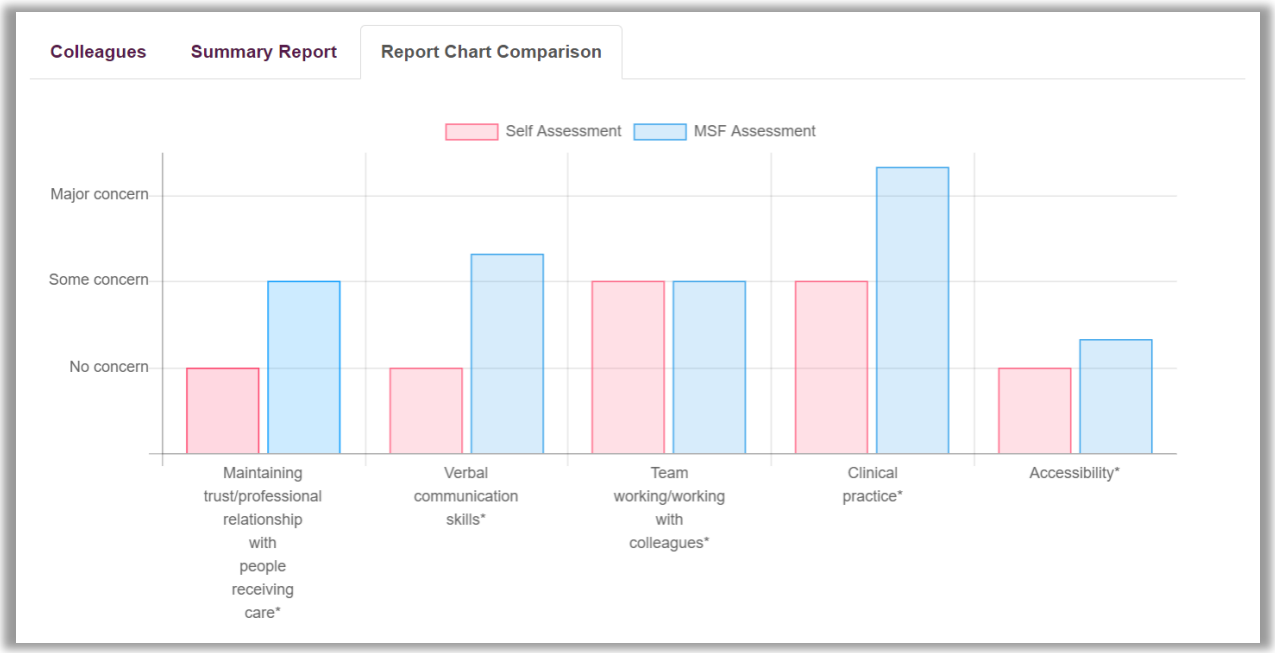

You will be taken to the multi-source feedback tool summary page, and the "**Summary Report**" tab will be automatically selected. If your learner has not yet closed the feedback process, then you will be presented with a holding message underneath the help text for the page.



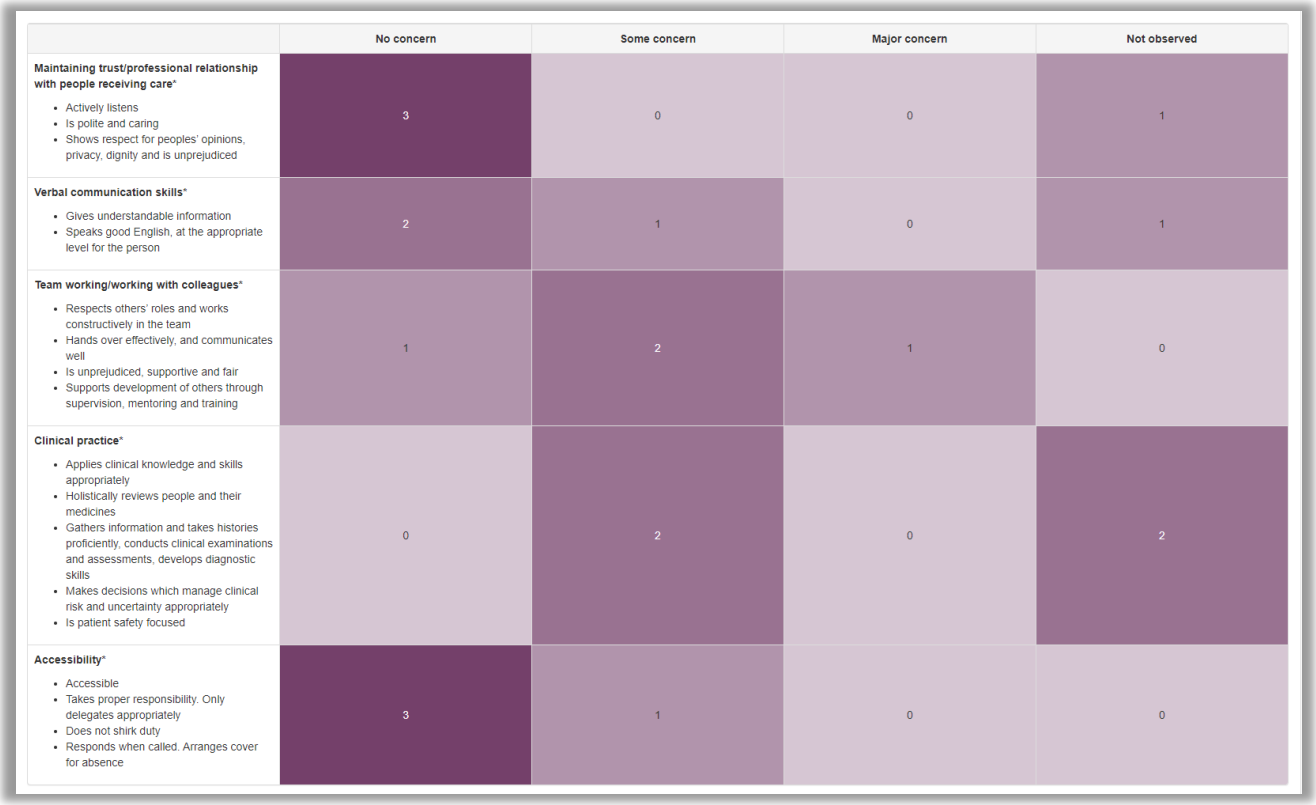

You can select the "**Colleagues**" tab to see the details of the colleagues that your learner invited to provide feedback on their practice.



You can also select the "**Report Chart Comparison**" tab to see a graphical representation of the ratings that your learner's colleagues provided.




Below the help text, you will presented with a table summary of the ratings that all invited colleagues have provided relating to your learner's practice.



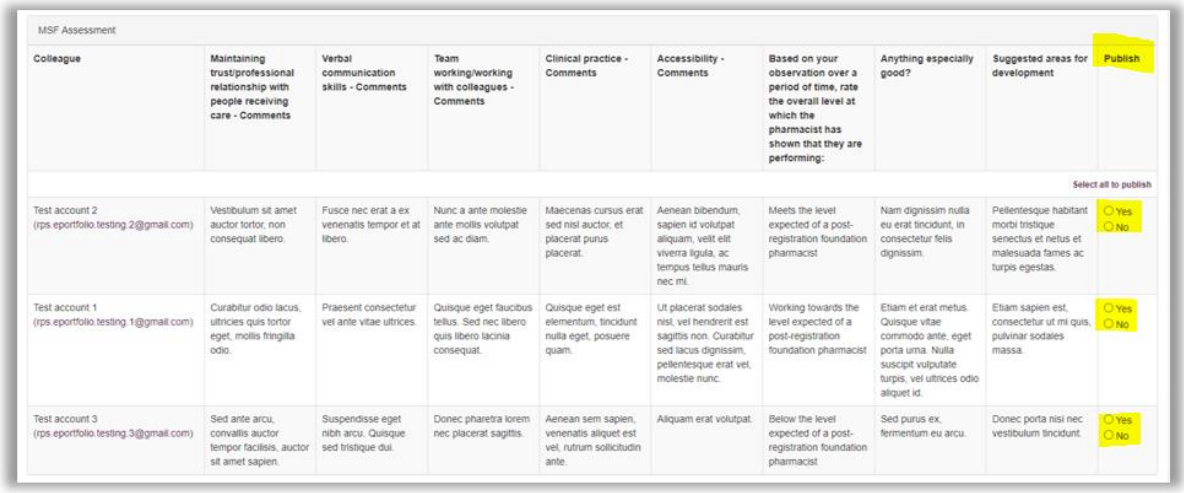
| | No concern | Some concern | Major concern | Not observed |
|---|---|---|---|---|
| **Maintaining trust/professional relationship with people receiving care*** • Actively listens • Is polite and caring • Shows respect for peoples' opinions, privacy, dignity and is unprejudiced | 3 | 0 | 0 | 1 |
| **Verbal communication skills*** • Gives understandable information • Speaks good English, at the appropriate level for the person | 2 | 1 | 0 | 1 |
| **Team working/working with colleagues*** • Respects others' roles and works constructively in the team • Hands over effectively, and communicates well • Is unprejudiced, supportive and fair • Supports development of others through supervision, mentoring and training | 1 | 2 | 1 | 0 |
| **Clinical practice*** • Applies clinical knowledge and skills appropriately • Holistically reviews people and their medicines • Gathers information and takes histories proficiently, conducts clinical examinations and assessments, develops diagnostic skills • Makes decisions which manage clinical risk and uncertainty appropriately • Is patient safety focused | 0 | 2 | 0 | 2 |
| **Accessibility*** • Accessible • Takes proper responsibility. Only delegates appropriately • Does not shirk duty • Responds when called. Arranges cover for absence | 3 | 1 | 0 | 0 |

Below the ratings table, you will also be able to see the specific comments that each feedback provider made, and you will be able to select/deselect any comments as appropriate. You may wish to exclude particular comments if you feel they are unbalanced,

incorrect or do not make any useful contribution. Please note that if you do not wish to publish a particular comment, the entire feedback form from that individual will be excluded.

As a supervisor, you will need to curate the feedback that has been provided by your learner's colleagues, and confirm that you are satisfied with this being published back to your learner. Where a feedback provider has noted major concern, you should contact them for more information to help inform how you feed back to your learner. Use your professional judgement to determine if follow up conversations are required where the feedback provider has noted 'some concern'.

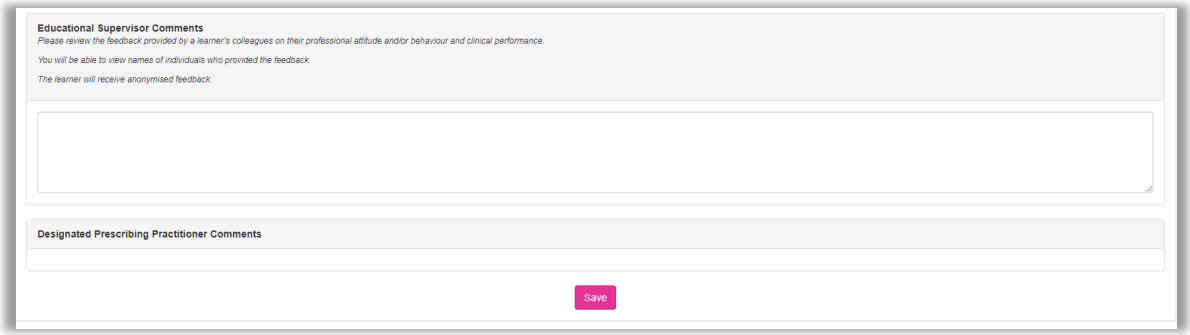
**NB. Please note, you will only be able to publish feedback back to your learner once they have closed the feedback cycle.**



MSF Assessment

| Colleague | Maintaining trust/professional relationship with people receiving care - Comments | Verbal communication skills - Comments | Team working/working with colleagues - Comments | Clinical practice - Comments | Accessibility - Comments | Based on your observation over a period of time, rate the overall level at which the pharmacist has shown that they are performing: | Anything especially good? | Suggested areas for development | Publish |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | Select all to publish |
| Test account 2 (rps.eportfolio.testing.2@gmail.com) | Vestibulum sit amet auctor tortor, non consequat libero. | Fusce nec erat a ex venenatis tempor et at libero. | Nunc a ante molestie ante mollis volutpat sed ac diam. | Maecenas cursus erat sed nisl auctor, et placerat purus placerat. | Aenean bibendum, sapien id volutpat aliquam, velit elit viverra ligula, ac tempus tellus mauris nec mi. | Meets the level expected of a post-registration foundation pharmacist | Nam dignissim nulla eu erat tincidunt, in consectetur felis dignissim. | Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. | Yes No |
| Test account 1 (rps.eportfolio.testing.1@gmail.com) | Curabitur odio lacus, ultricies quis tortor eget, mollis fringilla odio. | Praesent consectetur vel ante vitae ultrices. | Quisque eget faucibus tellus. Sed nec libero quis libero lacinia consequat. | Quisque eget est elementum, tincidunt nulla eget, posuere quam. | Ut placerat sodales nisl, vel hendrerit est sagittis non. Curabitur sed lacus dignissim, pellentesque erat vel, molestie nunc. | Working towards the level expected of a post-registration foundation pharmacist | Etiam et erat metus. Quisque vitae commodo ante, eget porta urna. Nulla suscipit vulputate turpis, vel ultrices odio aliquet id. | Etiam sapien est, consectetur ut mi quis, pulvinar sodales massa. | Yes No |
| Test account 3 (rps.eportfolio.testing.3@gmail.com) | Sed ante arcu, convallis auctor tempor facilisis, auctor sit amet sapien. | Suspendisse eget nibh arcu. Quisque sed tristique dui. | Donec pharetra lorem nec placerat sagittis. | Aenean sem sapien, venenatis aliquet est vel, rutrum sollicitudin ante. | Aliquam erat volutpat. | Below the level expected of a post-registration foundation pharmacist | Sed purus ex, fermentum eu arcu. | Donec porta nisi nec vestibulum tincidunt. | Yes No |

At the bottom of the page, you will also be presented with an opportunity to provide your own feedback to the learner.



**Educational Supervisor Comments**

*Please review the feedback provided by a learner's colleagues on their professional attitude and/or behaviour and clinical performance.*

*You will be able to view names of individuals who provided the feedback.*

*The learner will receive anonymised feedback.*

**Designated Prescribing Practitioner Comments**

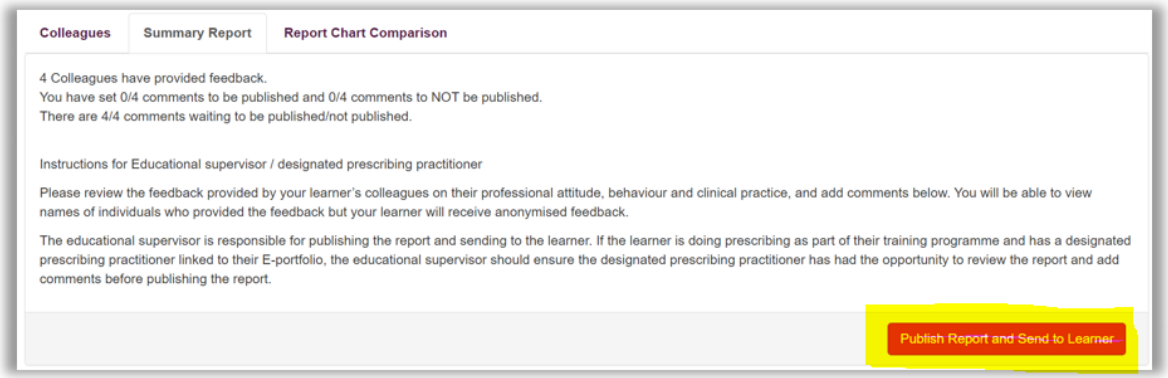
Save

Once your learner has closed the feedback process, you will be presented with a button at the top of the summary tab which allows you to publish feedback to your learner.

**NOTE: You should review the feedback before publishing it to your learner.**

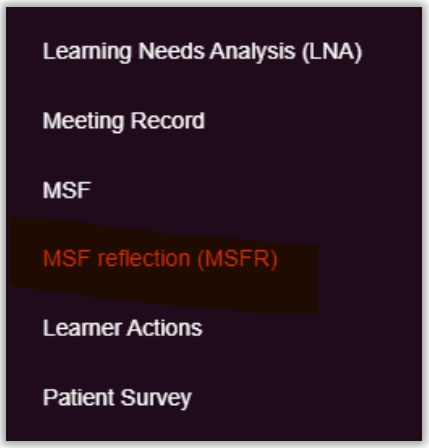
Once you have curated all feedback that has been provided, and you have left any additional comments that you deem appropriate, you can publish this report back to your learner by

clicking the “**Publish Report and Send to Learner**” button at the top of the summary report tab.




Once you have published this feedback to your learner, they will be notified via email that the report is now available to them, and they will be able to navigate to the tool to provide a final reflection on the feedback they have received, and assign themselves any appropriate actions for their ongoing development, before marking the tool as complete.

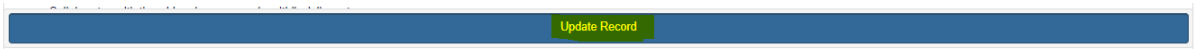
Your learner should then go on to complete the “**MSF reflection (MSFR)**” which you can access from the navigation menu.



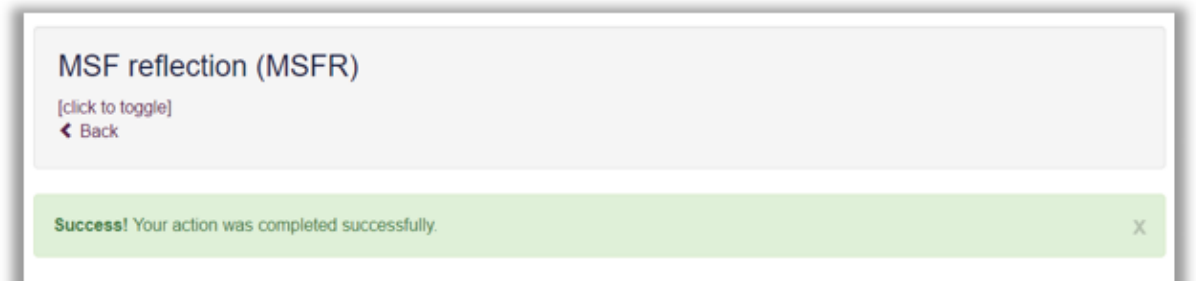

If you would like to add any additional comments to your learner’s multi-source feedback reflection tool, select “**Edit**” for the relevant MSF reflection form

Once you have accessed the form, you will be able to leave any additional comments for your learner in the “Educational Supervisor /Designated Prescribing Practitioner Comments” field.

Click on the “**Update Record**” button to save the record.




You will receive confirmation that the record has been updated and saved.




The multi-source feedback reflection can only be marked complete by your learner.

You can review completed multi-source feedback tools at any time by navigating to your learner’s E-portfolio and clicking the **“Multi-Source Feedback Tool”** in the left hand navigation menu.

## 8.13 Patient Survey (PS)

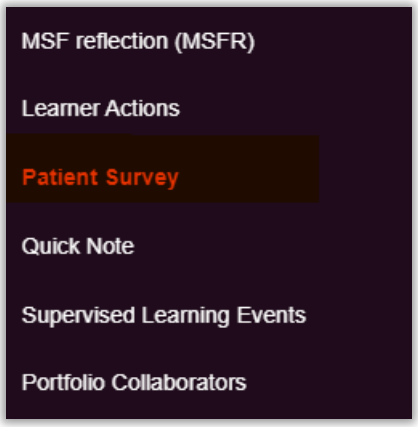
The patient survey tool enables your learner to collect feedback on their communication and consultation skills from the patients’ perspective.

### 8.13.1 Reviewing a patient survey

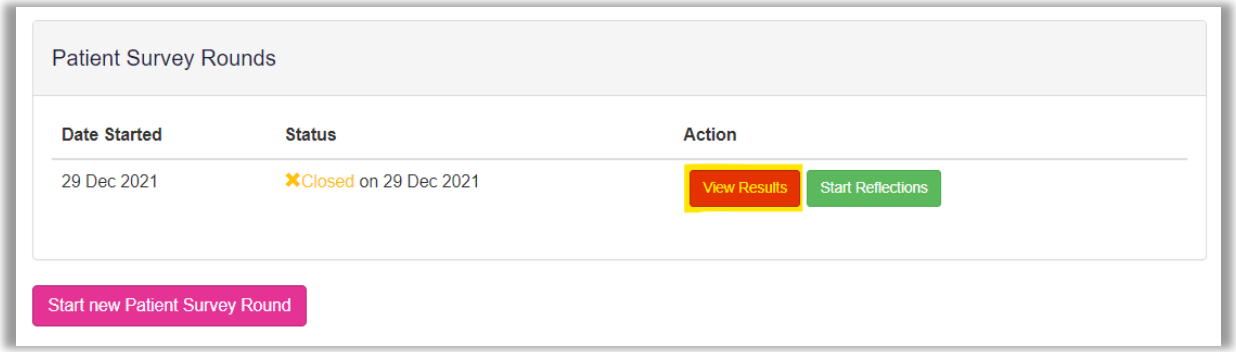
Patient surveys are initiated and conducted by your learner. At the end of the process, your learner will complete a reflection regarding the feedback they have received, and this form

contains a field for you to provide additional comments (however, these are not required, so your learner may complete the process without your input if they wish to).

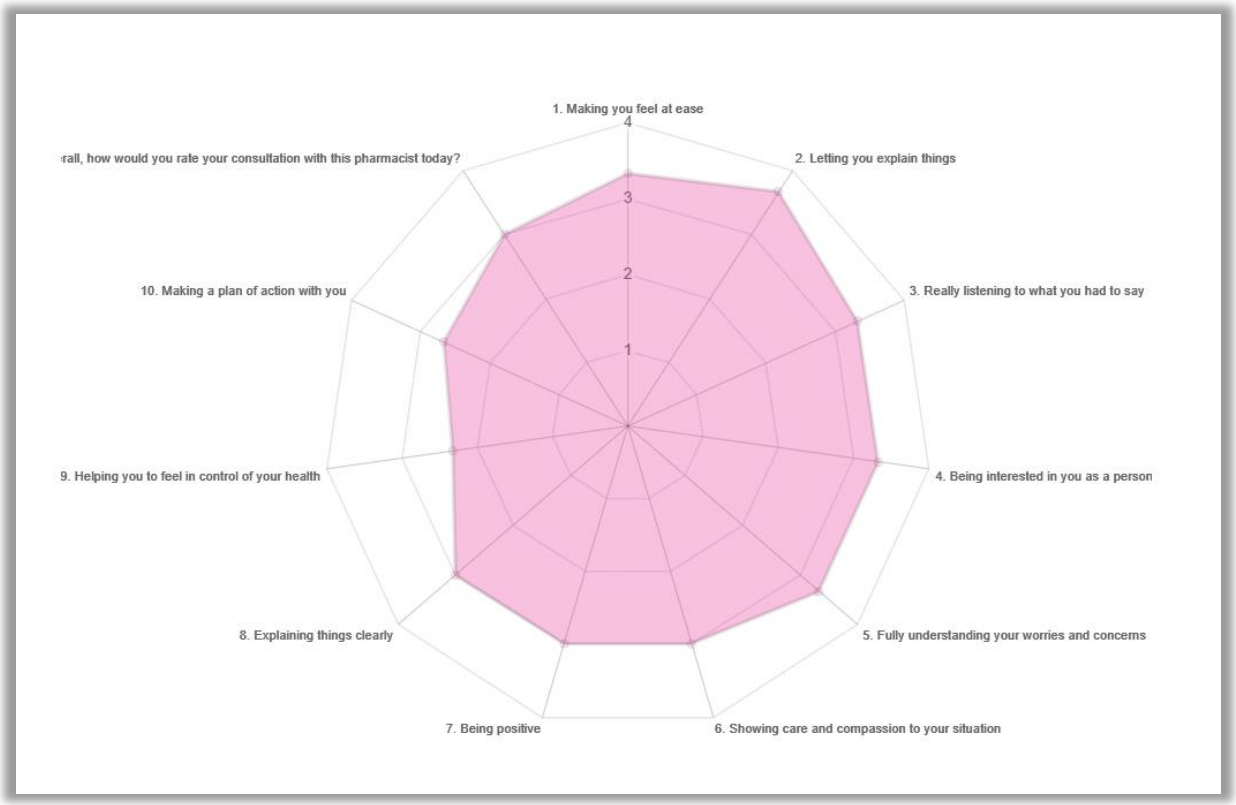
If you wish to provide additional comments for your learner's patient survey, you can do this by accessing their E-portfolio using your supervisor account, and then navigating to the "**Patient Survey**" in the left-hand navigation menu.



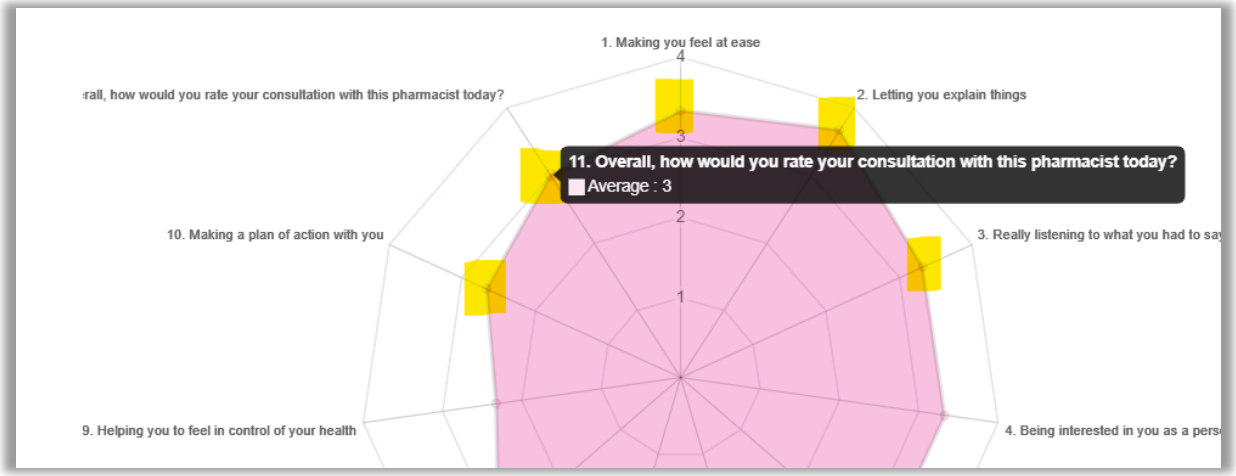

You will be presented with the Patient Survey summary screen. The feedback that your learner has received from the patients that they have surveyed can be viewed by clicking on "**View Results**".



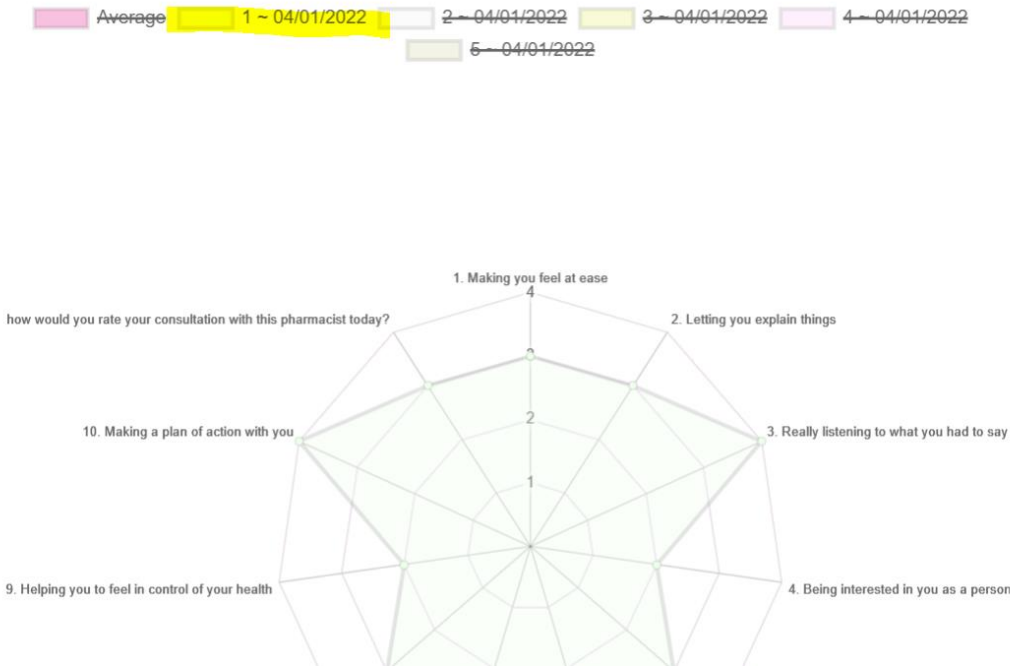

Your learner's results will appear as a spider diagram.




Hoovering over the total score for each area will provide you with an average score for their practice.

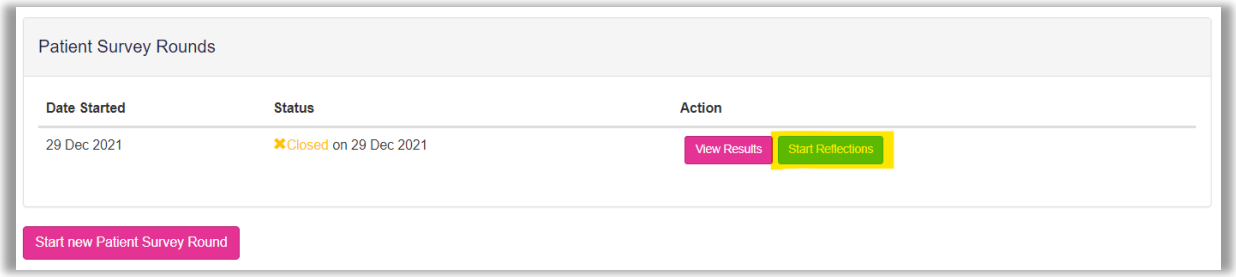



The default spider graph displays the average score but you can view individual responses by selecting which survey results you would like to see; you can do this by clicking on / off the respondents as show below:

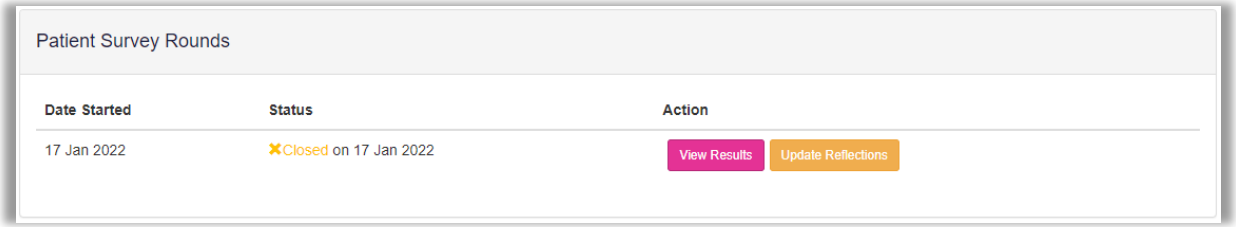



## 8.13.2 Reflecting on the feedback

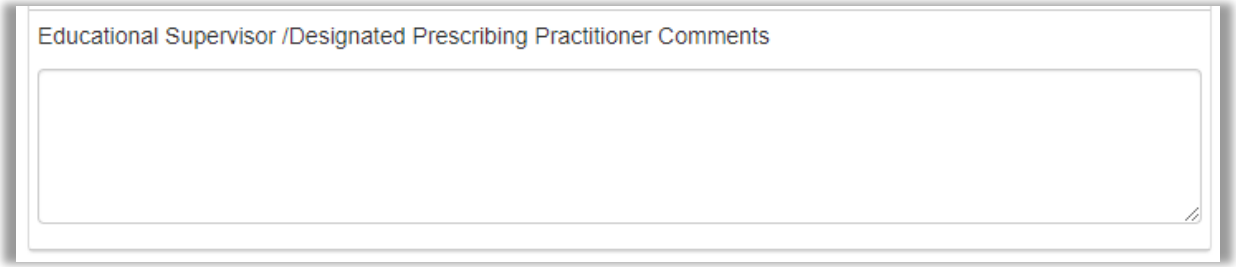
Your learner is required to reflect on the feedback that they have received by clicking on "**Start Reflections**" on the Patient Survey summary page. If they have not started these reflections yet, you are able to start the reflection process, however, you will not be able to complete the majority of the form since this is designed for the learner's reflections.



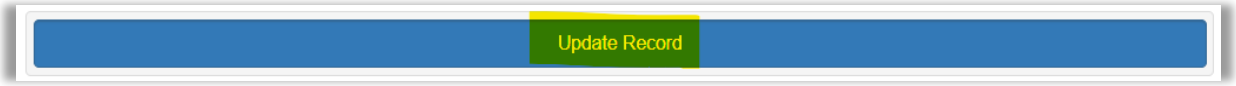

If your learner has already started their reflections, then you can access the form by clicking the "**Update Reflections**" button.



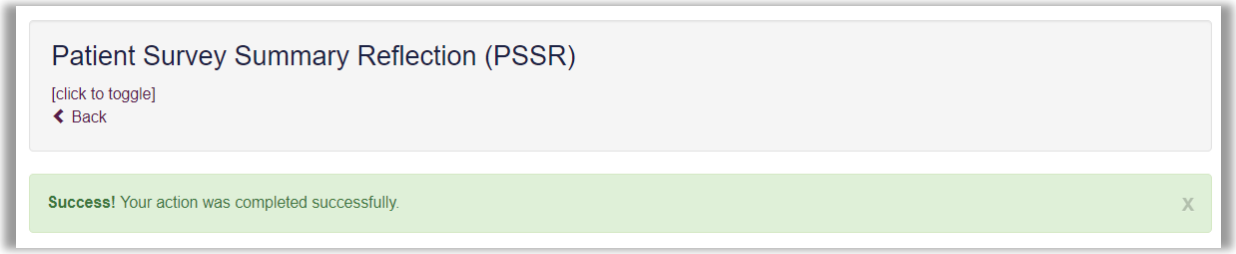

Once you have accessed the form, you will be able to leave any additional comments for your learner in the "Educational Supervisor /Designated Prescribing Practitioner Comments" field.




Click on the "**Update Record**" button to save the record.




You will receive confirmation that the record has been updated and saved.



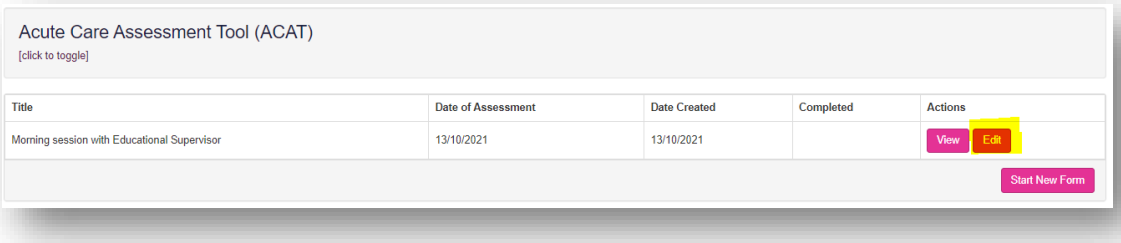

Click on "**Back**" to return to the main **Patient Survey** page.

The Patient Survey can only be marked as complete by your learner.

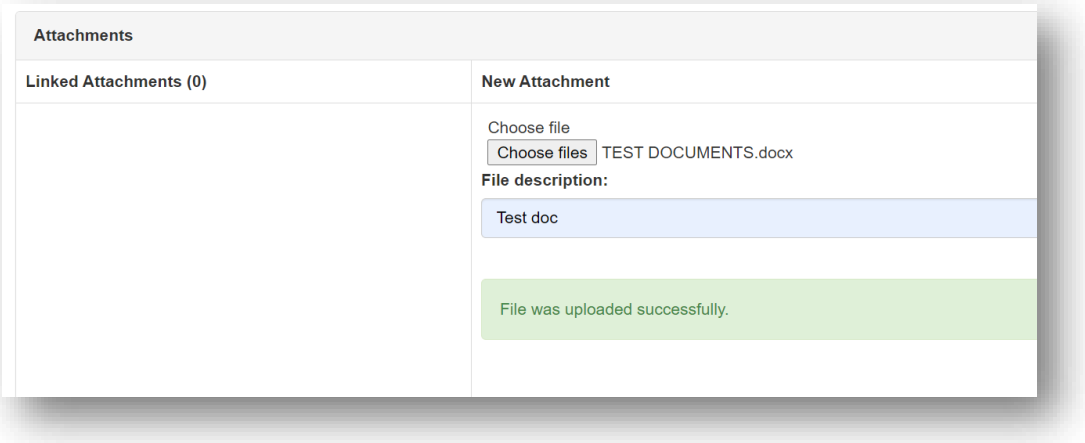
## 8.14 Attaching a file to an assessment tool

You will have noticed that you were not able to attach files when first completing any supervised learning event or other tools. A file can only be attached once you have saved the form by selecting "**Create Record".** To upload an attachment as additional evidence for the assessment tool, select **"Edit"** to view the record you have just created and upload a file.

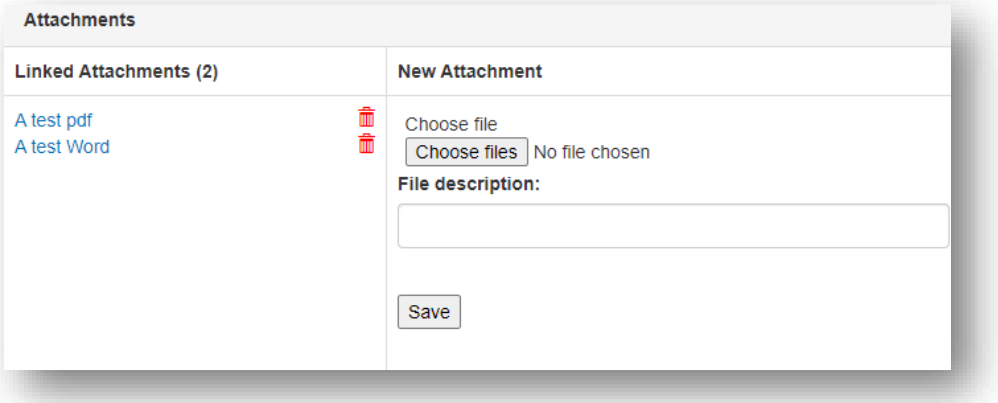
For example, if you would like to attach a file to an Acute Care Assessment Tool, go to the Acute Care Assessment Tool summary page and select **"Edit"**.



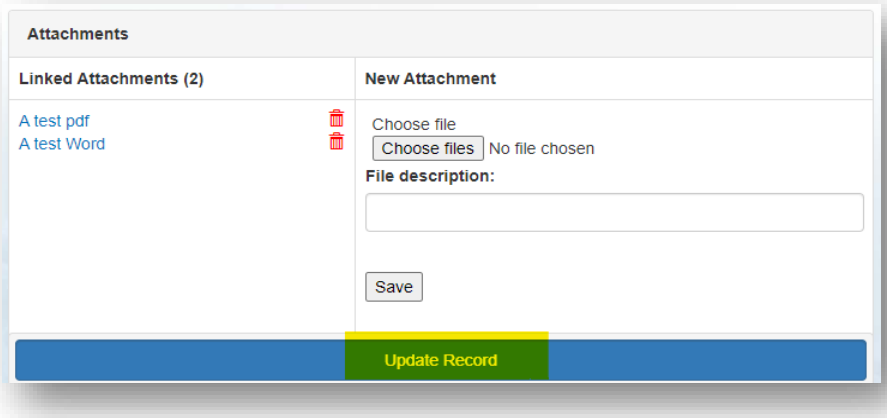

Scroll down the form until you get to the 'Attachments' section. Add the upload by selecting "**Choose files"**. You must enter a file description. Click "**Save**" once completed.




You can upload as many files as you wish and delete any that are no longer relevant by clicking on the trash can icon.




When done select "**Update Record**".



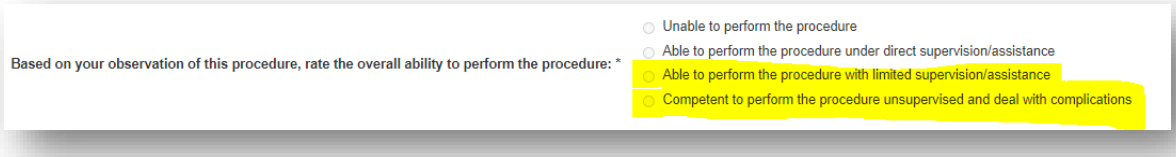

You will receive confirmation that the record has been updated.

You can view and edit the form as per instructions provided in **section 7.3**.

# 9 Clinical assessment skills

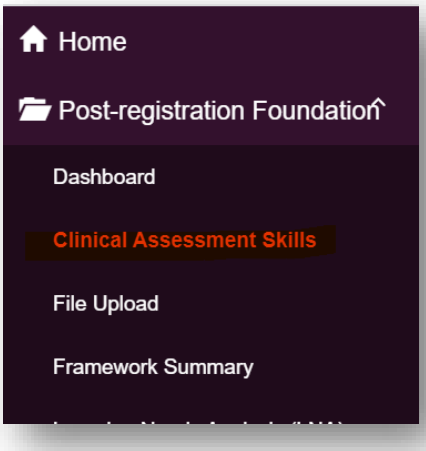
The ‘Clinical Assessment Skills’ areas provides a summary of your learner’s progress with the clinical assessment skills, helping to focus and prioritise their learning.

Your learner is required to have a total of three **“Direct Observation of Practical Skills”** for each skill with an overall rating of either ‘Able to perform the procedure with limited supervision / assistance’ **or** ‘Competent to perform the procedure unsupervised and deal with complications’ one of the two highest ratings on the form.

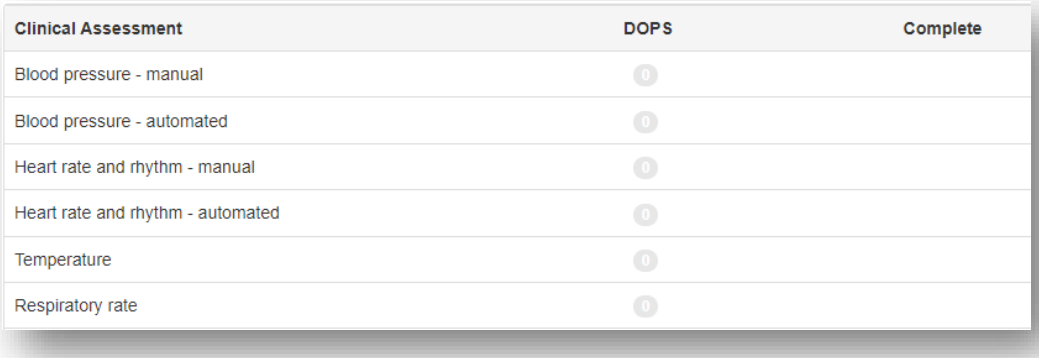



## 9.1 Accessing Clinical Assessment Skills

To access the list of clinical assessment skills, select “**Clinical Assessment Skills**” from the navigation menu.

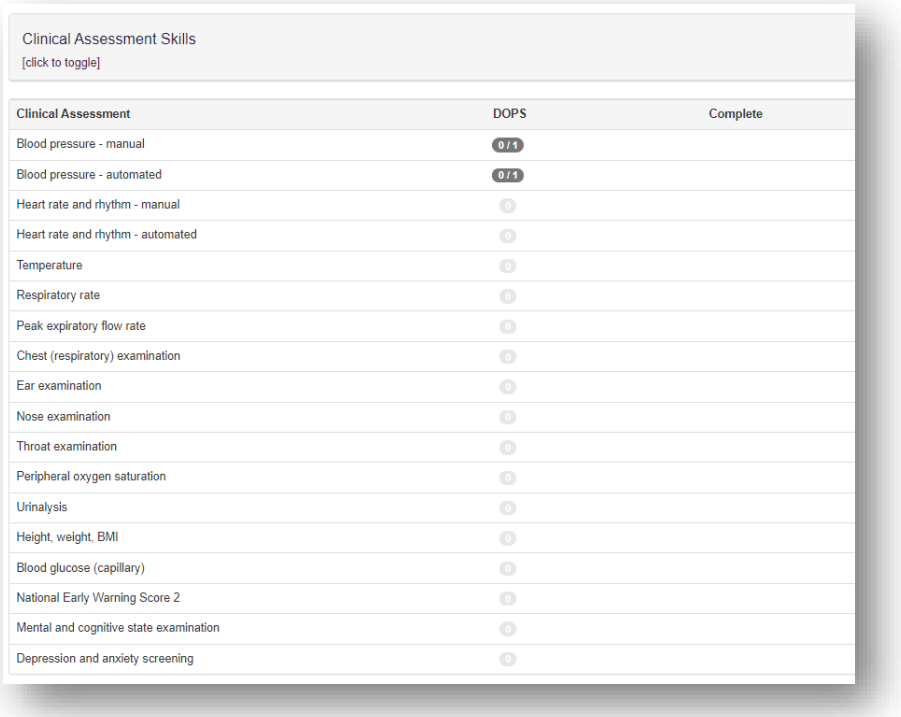



The list of clinical assessment skills will appear.



| Clinical Assessment | DOPS | Complete |
|---|---|---|
| Blood pressure - manual | 0 | |
| Blood pressure - automated | 0 | |
| Heart rate and rhythm - manual | 0 | |
| Heart rate and rhythm - automated | 0 | |
| Temperature | 0 | |
| Respiratory rate | 0 | |

If your learner has started a “Direct Observation of Practical Skills” for one of the clinical assessment skills listed above and mapped it to the relevant clinical assessment skill, it will appear as the right-hand number in the count for the clinical skill (see below). When your learner marks the form as complete, it will change from “**0/1**” to “**1/1**”.




## 10 File Upload

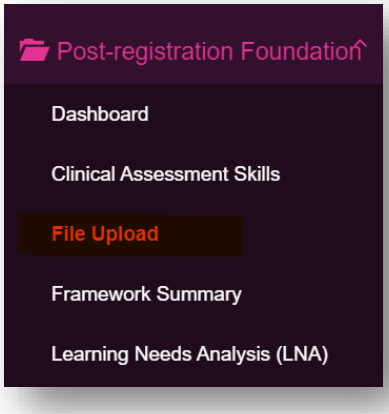
This area of the E-portfolio allows you or your learner to upload any files that are relevant to your learner’s learning and development. This could include other supervised learning events, documents and training certificates. This ensures that all information linked to the learner’s post-registration foundation pharmacist programme is saved in one place.

**TIP:** If your pieces of evidence are linked, then upload altogether in one file upload and add naming conventions.

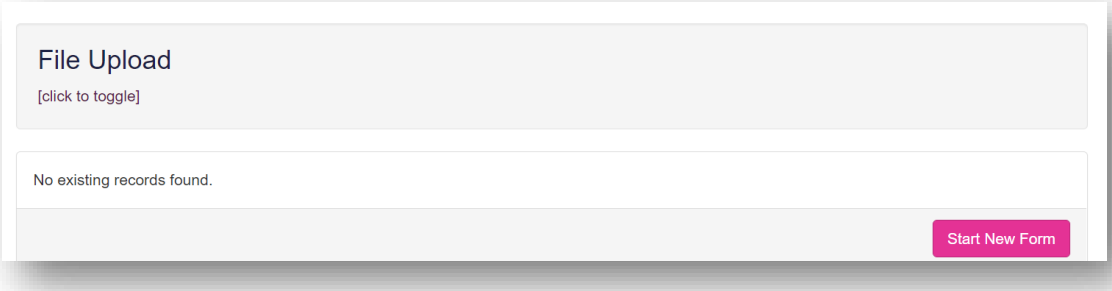
For example if you upload a Direct Observation of Non-Clinical Skills (DONCS) and want to add a copy of a guideline your learner was involved in developing and is linked to the DONCS, upload them at the same time with the same naming conventions:

**DONCS_(1) 10.10.21**
**Guideline_(1) 10.10.21**

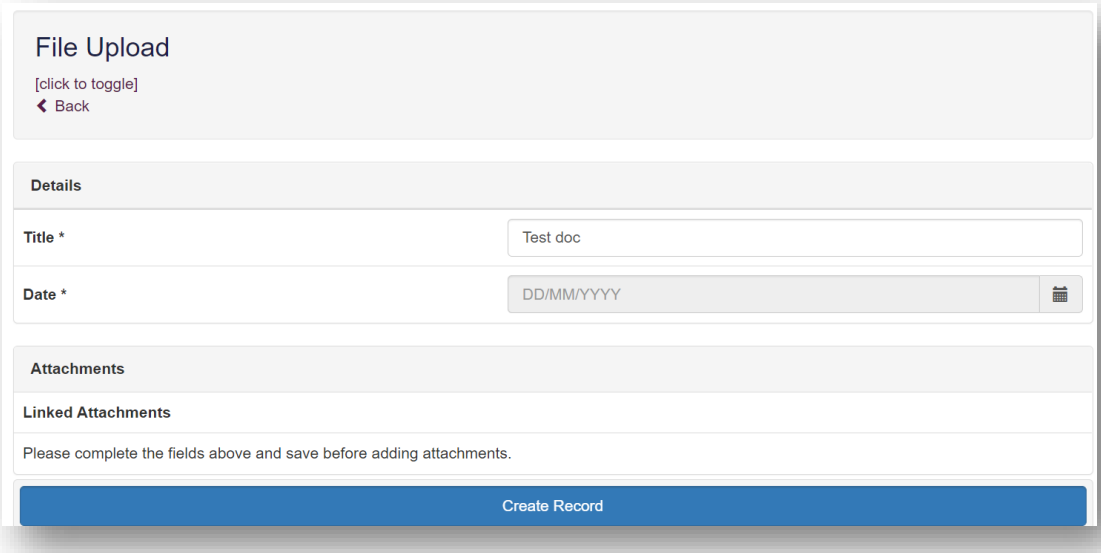
To access “**File Upload”**, select from the sidebar menu.



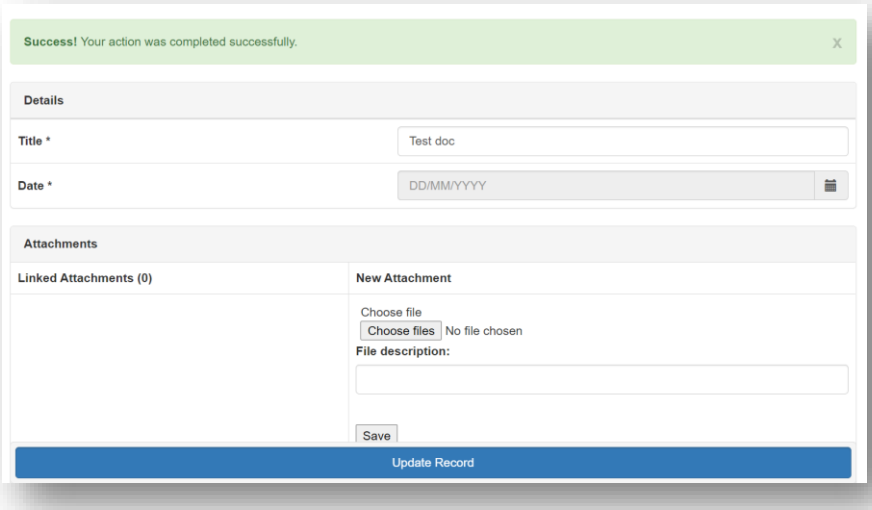

Select "**Start New From"** to start the creation of your file upload.



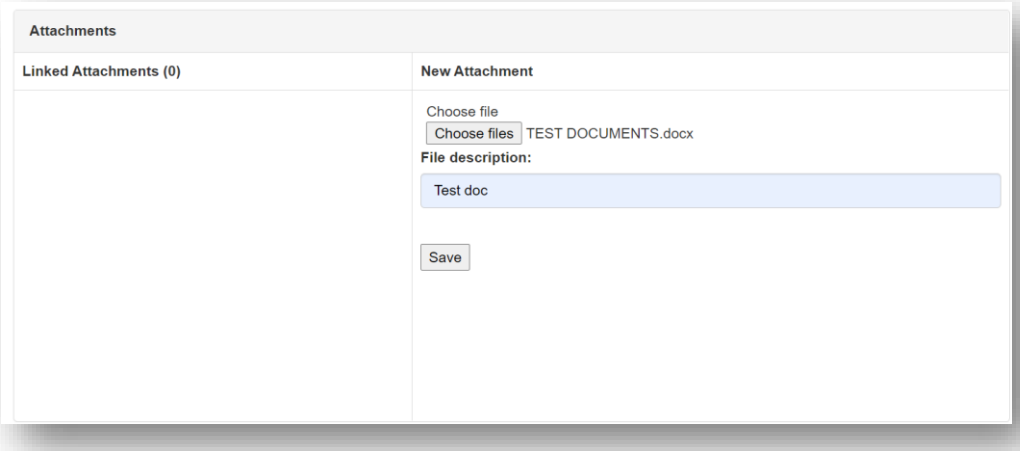

The 'File Upload' form will appear. Completed the required fields as instructed.




Click **"Create Record"** to save.

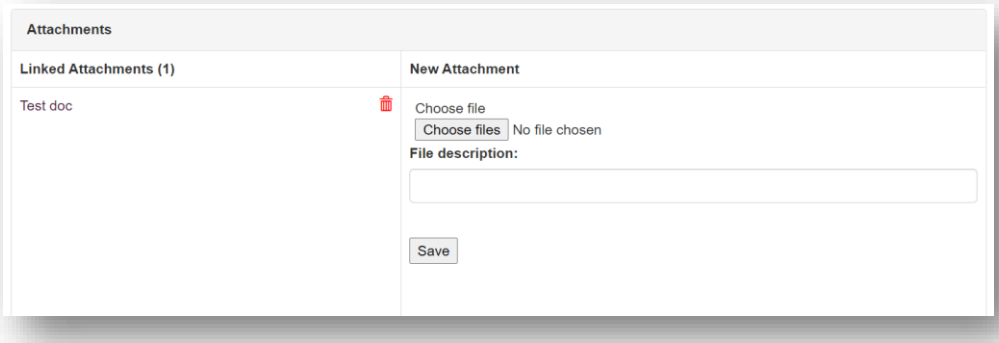



You'll see confirmation that the record has been saved. Add your file by selecting '**Choose files**'.

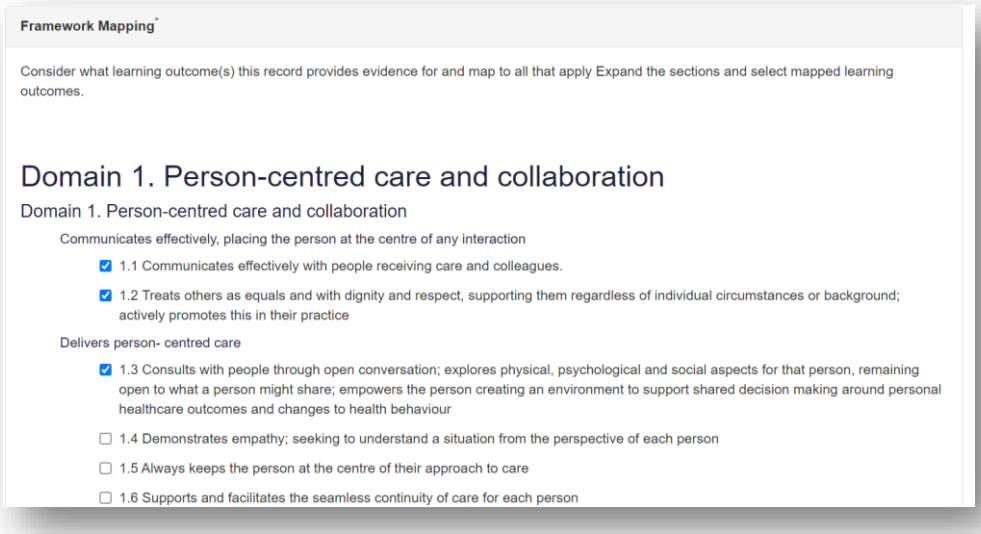



The file will upload.

**TIP:** You can upload as many files as you wish and delete any that are no longer relevant by clicking on the trash can icon.




You have the option to select the mapping which will be supported by this file upload. Remember to select "**Update Record**" once completed.



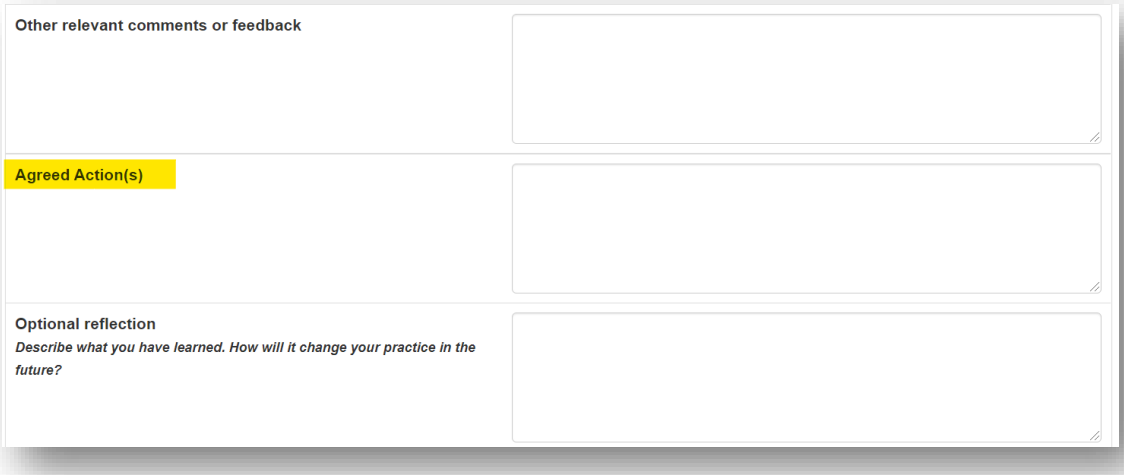

# 11 Learner Actions

This section displays a list of actions that have been generated within other tool and forms within the E-portfolio. This will become your learner's 'to-do' list for their learning and development. Your learner can view actions and mark them as complete as they progress through their training. You will be able to review actions and provide feedback on them.

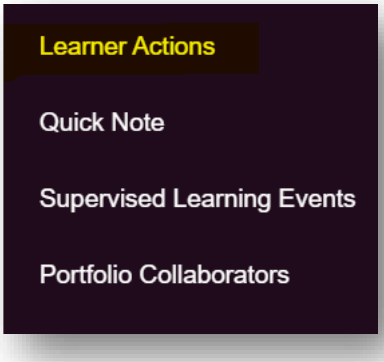
## 11.1 Creating and viewing actions

All supervised learning event forms, meeting records and other records contain a field allowing your learner and you to create an action. Anything inputted in the "**Agreed action(s)**" section of a tool or form will create an action that will appear in the "**Learner Actions"** section.

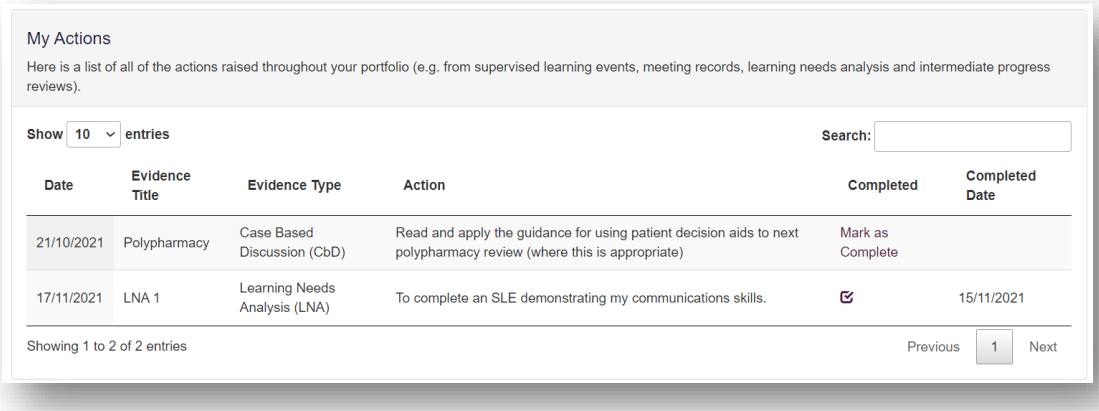
More information about completing supervised learning events can be found in **section 8.**




To view your learner's actions, select the "**Learner Actions**" option in the navigation menu.

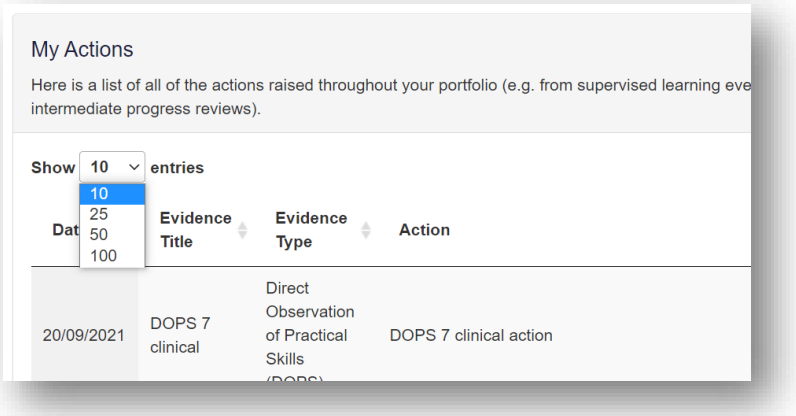



You can view the all of the different actions generated throughout your learner's portfolio.



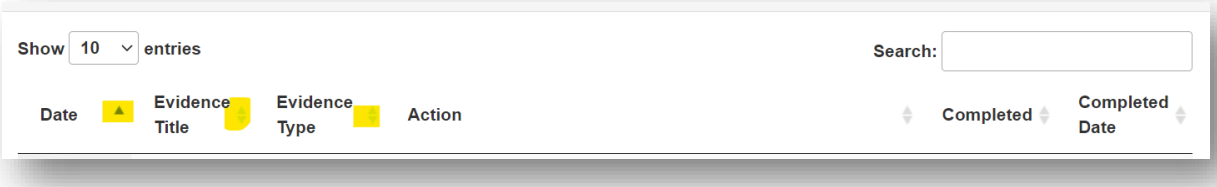

**NOTE:** you will not be able to make any edits to actions from this page; if you would like to edit an action, you will need to back to the original record where it was created. You will also not be able to mark the action as complete; only learners have permission to do this.

You can choose to view more action items on a page by selecting “Show” and selecting the number of items you want displayed from the drop-down list.




You can search for actions by typing text in the search field.

You can also sort actions by clicking on the arrows next to each column.




To view more actions on subsequent pages, use the page options at the bottom of the screen.

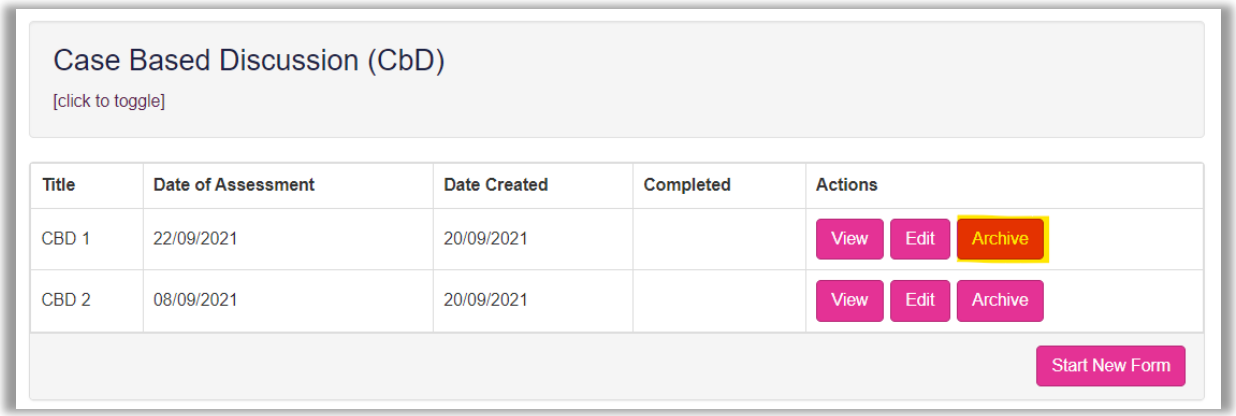
# 12 Archiving records

You can archive any records that you/your learner may have started in error but no longer want to keep. The records that you can archive are:

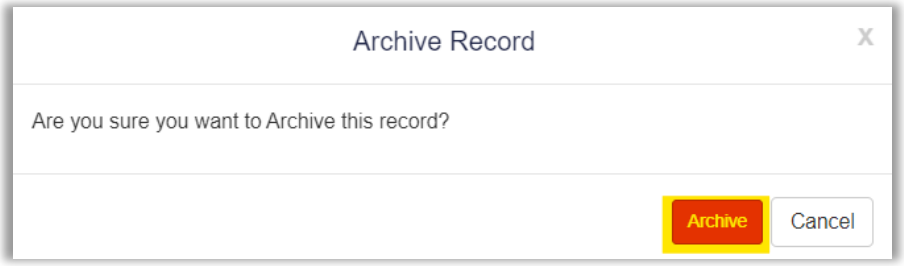
- Supervised learning events
- Meeting records

**NOTE**: Archived records are not permanently deleted and can be retrieved at any time.

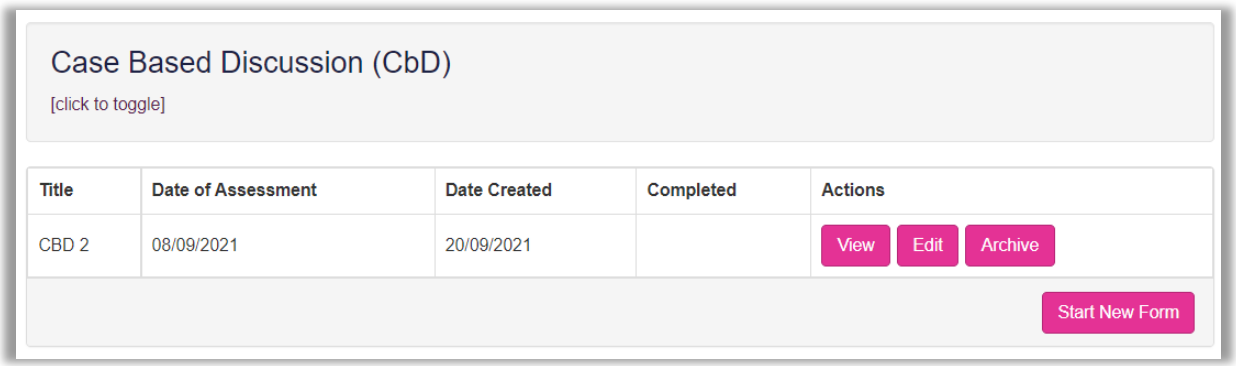
To archive a record, select "**Archive**" within the main record area.




Confirm that you want to archive the record by selecting "**Archive**" when the pop-up box appears.

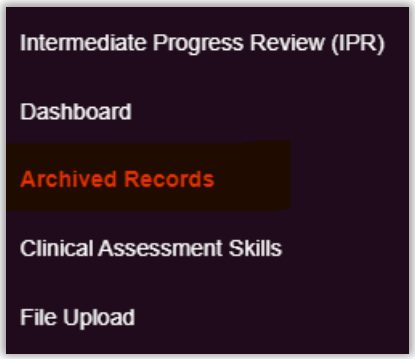



The record will be removed from your learner's list of records.

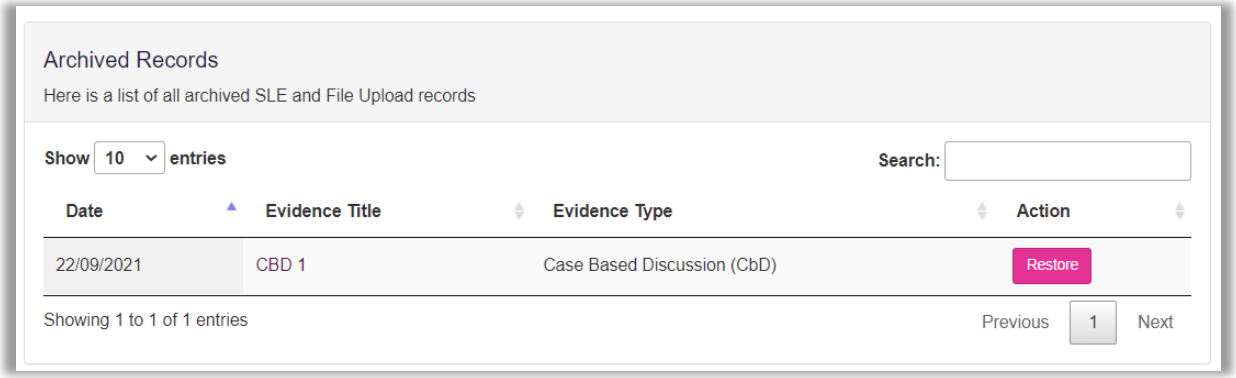


## 12.1 Viewing and retrieving archived records

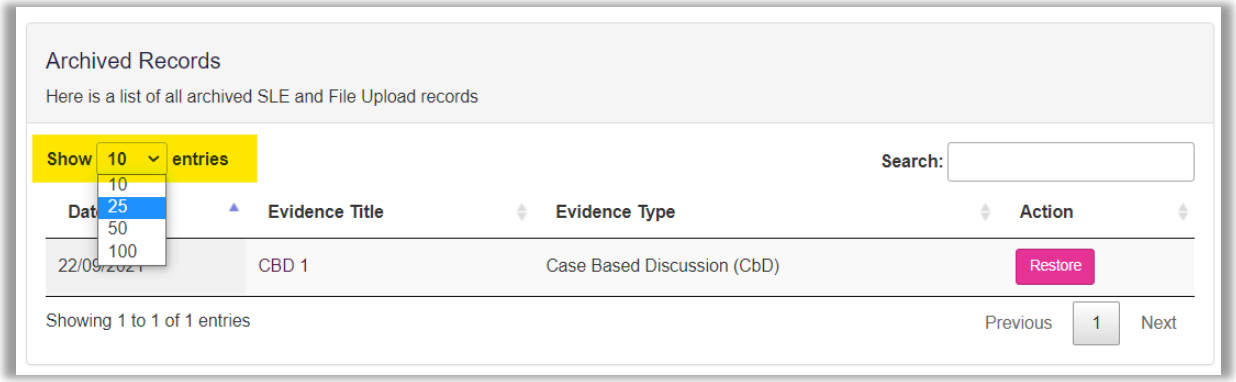
Select "**Archived Records**" from the navigation menu to view your learners' archived records.



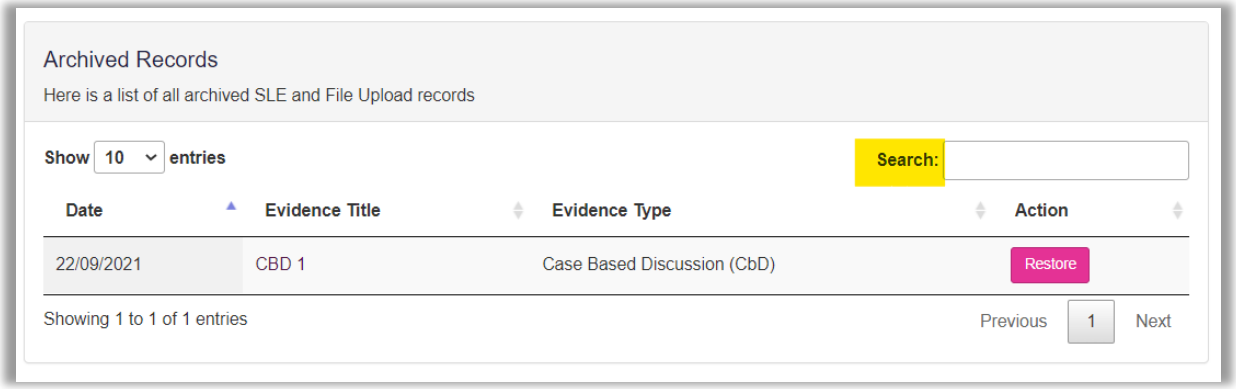

The list of archived records will appear. To view a record, click on the title of the record.



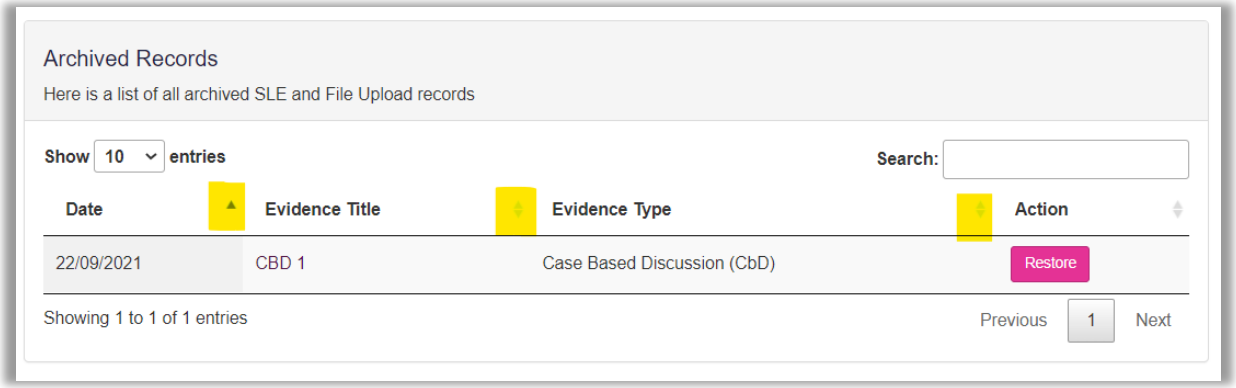

You can choose to view more records on a page by selecting "**Show**" and selecting the number of items you want displayed from the drop-down list.




You can search for records by typing text in the search field.

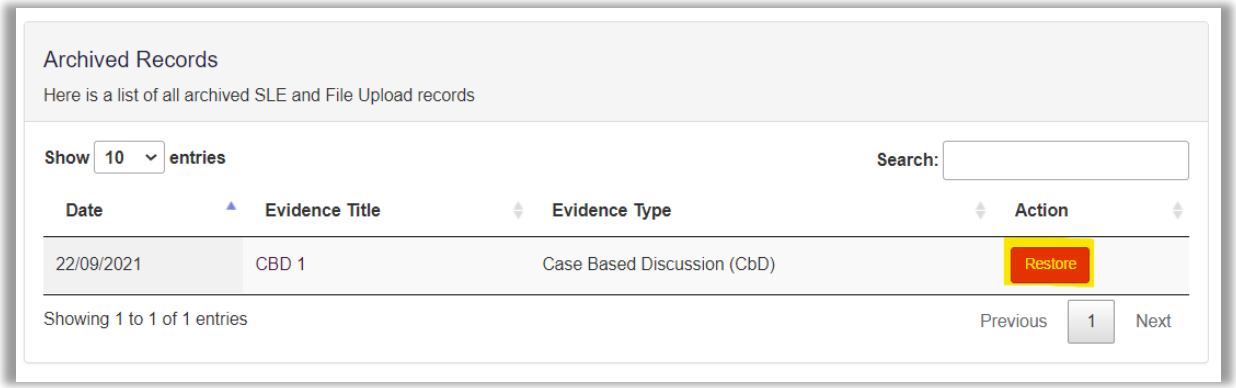



You can additionally sort your records by clicking on the arrows next to each column.

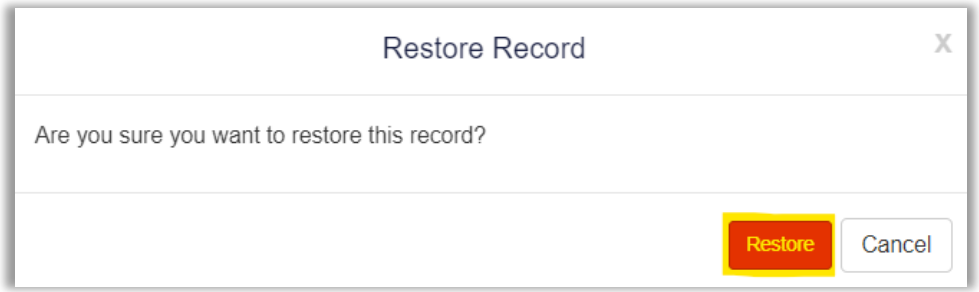



To view more records on subsequent pages, use the page options at the bottom of the screen or the "**Next**" and "**Back**" buttons.

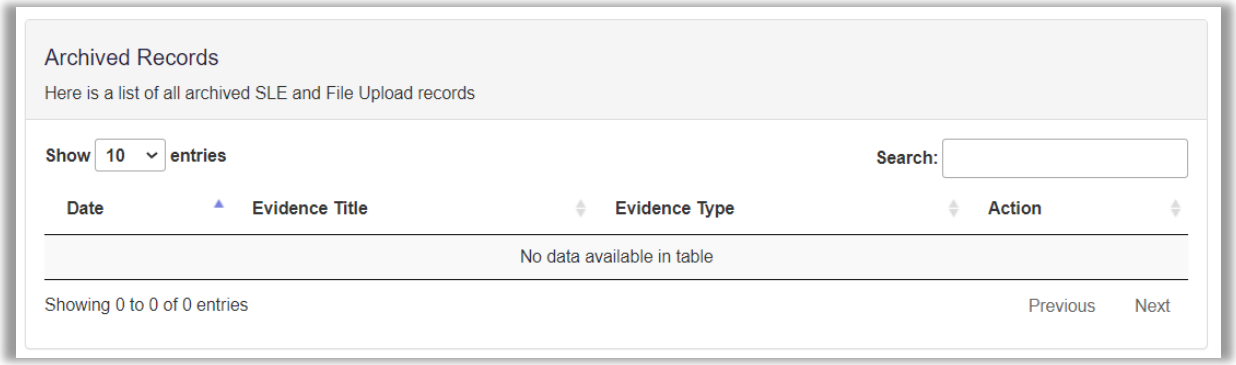
To restore a record click on the "**Restore**" button next to the relevant record.



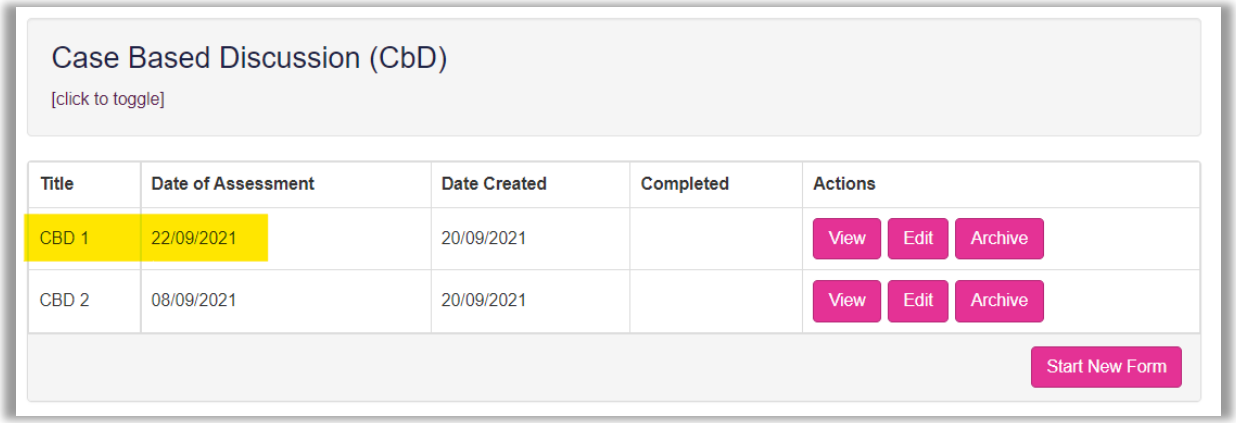

Confirm that you want to restore the record by selecting "**Restore**" when the pop-up box appears.




The record will be removed from the archived records list.




The restored record can then be found in its original location.

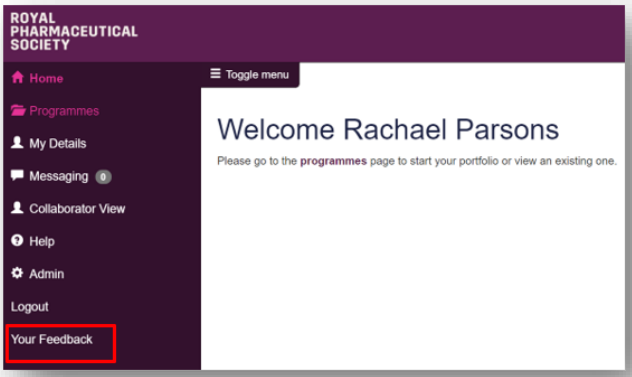



## 13 Feedback

We would love to capture feedback from your experiences using the RPS E-portfolio. The results will be reviewed on a periodic basis to identify elements which can be updated to ensure that it is as user friendly as possible.

To provide feedback, please complete this survey. The survey should take approximately 5 minutes to complete and all responses are anonymous.

Alternatively you can complete the feedback form directly from the E-portfolio. On the homepage, click on "**Your Feedback"** from the menu on the left hand side. You will then be redirected to the survey.




## 14 Contact Details

Visit https://www.rpharms.com/development/credentialing/foundation/post-registration-foundation-curriculum for further information about the post-registration pharmacist credentialing process.

For any questions about the requirements of the post-registration foundation pharmacist credentialing and RPS products and service please contact our dedicated support team:

Email: support@rpharms.com
Telephone: 0207 572 2737 (9am to 5pm, Monday to Friday)

If you experience any technical issues or have any feedback on the platform, please contact our technical team.

Email: eportfolio@rpharms.com

Telephone: 0207 572 2737 (9am to 5pm, Monday to Friday)

**Acknowledgements**

RPS E-Portfolio designed by AXIA
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