

# NHS England Foundation Trainee Pharmacist E-portfolio User Guide

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# Contents

1. Introduction.....	4
2. Getting Started .....	5
2.1 Getting access to the E-portfolio.....	5
2.2 Accessing the E-portfolio .....	6
2.3 User types and permissions.....	7
2.4 Help and additional information.....	8
2.5 Session timer .....	8
2.6 Saving work .....	9
2.7 Logging out.....	9
2.8 Deleting and restoring records.....	10
3. Navigating the E-portfolio .....	11
3.1 The Dashboard .....	11
3.2 The Navigation Menu.....	13
3.3 Designated Supervisor Self Development Area (for DSs).....	14
4. Completing Assessment Tools and Forms .....	15
4.1 Assessment tools and forms .....	15
4.1.1 Online process .....	15
4.1.2 Upload process .....	18
5. Learning Needs Analysis (LNA).....	20
5.1 Completing an LNA.....	20
6. Recording Absence and Meetings .....	22
6.1 Absence.....	22

6.2 Designated Supervisor Meeting form.....	22
6.3 Other Meeting .....	23
7. Supervised Learning Events (SLEs) .....	24
7.1 Creating an SLE.....	24
7.1.1 Mapping to the Assessment Activities and GPhC Learning Outcomes ...	25
7.1.2 Saving the record and notifying the DS (for trainees).....	26
7.1.3 Reviewing and signing off SLEs (for DSs).....	26
8. Contribution to Care Tools.....	28
8.1 Contribution to Care Log(s).....	28
8.1.1 Creating a Contribution to Care Log.....	28
8.1.2 Mapping to the Assessment Activities and GPhC Learning Outcomes ...	29
8.1.3 Saving the record and notifying the DS (for trainees).....	29
8.1.4 Reviewing and signing off Contribution to Care Log(s) (for DSs) .....	30
8.2 Reflective Account .....	32
8.2.1 Creating a Reflective Account.....	32
8.2.2 Mapping to the Assessment Activities and GPhC Learning Outcomes ...	33
8.2.3 Saving the record and notifying the DS (for trainees).....	33
8.2.4 Reviewing and signing off Contribution to Care Log(s) (for DSs) .....	34
9. Feedback Tools .....	35
9.1 Multi-Source Feedback Tool (MSF) .....	35
9.1.1 Initiating the Multi-Source Feedback process.....	35
9.1.2 Adding additional colleagues.....	36
9.1.3 Extending the feedback process .....	36
9.1.4 Trainee pharmacists completing the self-assessment.....	37
9.1.5 Closing the feedback process .....	37

9.1.6	Reviewing feedback .....	37
9.2	Patient Satisfaction Questionnaire (PSQ) .....	39
9.2.1	Initiating the patient satisfaction questionnaire process .....	39
9.2.2	Reviewing Feedback .....	40
10.	Miscellaneous Evidence .....	41
10.1	Creating a Miscellaneous Evidence Upload .....	41
10.1.1	Mapping to the Assessment Activities and GPhC Learning Outcomes ..	42
10.1.1	Saving the record and notifying the DS (for trainees) .....	42
10.1.2	Reviewing and signing off (for DSs) .....	43
11.	Actions .....	44
11.1	Creating and viewing Actions .....	44
11.2	Completing Actions .....	44
12.	Foundation Training Progress .....	45
12.1	Outcome Matrix .....	45
12.2	Training Progress Reports .....	47
12.2.1	Creating and completing a Foundation Training Progress Report form – week 13 and 26 .....	47
12.2.2	Creating and completing a Foundation Training Progress Report form – week 39 and 52 .....	48
13.	Closing your E-portfolio .....	50
13.1	Completing the closure process .....	50
13.2	Downloading your certificate .....	50
14.	Contact Details .....	52
15.	Glossary .....	53
	Version History .....	57

# 1. Introduction

NHS England Workforce, Training & Education (NHS England WT&E) have appointed the Royal Pharmaceutical Society (RPS), in collaboration with Axia Digital, to deliver the E-portfolio system for all trainee pharmacists in England.

The E-portfolio will assist trainees and designated supervisor(s) to record, upload, manage and review evidence to demonstrate progress against the General Pharmaceutical Council (GPhC) interim learning outcomes of the initial educational and training standards, supported by the [Foundation Trainee Pharmacist Assessment Strategy](#).

The E-portfolio is owned and driven by the trainee pharmacist, and it is their responsibility to keep the E-portfolio up to date with records of learning and development. Other users will also have access to the E-portfolio to support the trainee pharmacist develop their portfolio of evidence.

This document is a user guide that outlines the main functions of the E-portfolio. It does not provide details on how the assessment activities or tools should be used in practice. For more information on these users should review the [Foundation Trainee Pharmacist Assessment Strategy and Activities and Tools Guide](#).

It provides trainees, Designated Supervisors (DSs) and Education Leads with an overview of how to:

- Access the E-portfolio
- Navigate the E-portfolio
- Use the assessment tools and forms within the E-portfolio
- Record trainee progress against the learning outcomes and sign off points

You may find it helpful to have your E-portfolio open when using this guide. Alongside this guide there are further E-portfolio resources and guidance available [here](#), including user videos and frequently asked questions. This link contains downloadable versions of the different assessment tools and forms. A glossary of terminology used in this guide can be found in [section 15](#).

## 2. Getting Started

This section provides users with further information on:

- Getting access to the E-portfolio
- Accessing the E-portfolio
- User roles and permissions within the E-portfolio
- Help and additional support within the E-portfolio and additional resources
- Basic functionalities of the E-portfolio

### 2.1 Getting access to the E-portfolio

Access to the E-portfolio is dependent on the registration and processing of a trainees My GPhC application. To ensure prompt access to the E-portfolio, trainees should ensure they register with the GPhC as soon as possible.

To gain access to the E-portfolio, trainees, Designated Supervisors (DSs) and Education Leads must complete a registration survey. The links to the surveys can be found on [this page](#).

It takes a few weeks to match and verify your data. Providing everything matches, you will receive an automated email from <noreply@messages.axiadigital.co.uk> which will provide you with login details to access the E-portfolio.

Please check your junk/spam mail folder, as automated emails can get filtered out as spam.

**NOTE:** Failure to provide the correct information or if information needs to be verified by the GPhC, can result in delays with access.

If trainee pharmacists have a wait between requesting access and receiving their log on details, trainee pharmacists are encouraged to utilise the downloadable evidence forms and templates [from this link](#) to start collating evidence. These can be uploaded within the E-portfolio after access has been granted.

## 2.2 Accessing the E-portfolio

The Foundation Trainee Pharmacist E-Portfolio can be accessed at:

<https://pharmacistportfolio.hee.nhs.uk/>

Trainee pharmacists, Designated Supervisors and Educational Programme Directors/Educational Leads will need to read and accept the terms and conditions when first accessing the E-portfolio.

When first logging to an account, please make sure that you copy the password directly from the access email. Do not add any spaces/additional characters, as this will result in your login failing. If your first attempt at logging in fails, we recommend manually copying out your password to avoid any errors.

When trainee pharmacists log into the E-portfolio for the first time, they will be asked to confirm their GPhC training number. This starts with a 4 and is 7 digits long. If a trainee does not have this number to hand, then they can close this window and enter their GPhC training number at a later date.

We recommend that users change their password to something more secure/memorable. This can be done by selecting the 'My Details' tab in the menu on the left-hand side of the page and selecting 'Change password' in the top right-hand corner. Whilst on the 'My Details' page, users should check their details are correct. Should there be any incorrect details, please contact [trainee pharmacist@hee.nhs.uk](mailto:trainee pharmacist@hee.nhs.uk).

If you forget your password at any point you will need to reset it by selecting 'Forgotten password?' on the log-in screen. You will be directed to a screen that enables you to reset your password. You can also request a reminder of your username on this screen.

If the wrong password is entered on more than 3 occasions, users will be locked out of their account. If this happens, please contact the RPS at [eportfolio@rpharms.com](mailto:eportfolio@rpharms.com) or on 0207 572 2737 (9am-5pm, Mon-Fri).

## 2.3 User types and permissions

There are 4 different user types within the E-portfolio. These are:

- Trainee Pharmacist
- Designated Supervisors (DSs)
- Education Lead/ Education Programme Director (referred to as EPD throughout this document)
- Collaborators

Trainees, DSs and EPDs all require an account to use the functionalities within the E-portfolio.

Trainees will be linked in the E-portfolio to their DS(s) and EPD (if applicable). Until the trainee creates and saves a new piece of evidence within the E-portfolio, the DS or EPD will not be able to see their portfolio.

Within the E-portfolio forms, there are some boxes and fields within the forms that only certain types of user can complete. You will therefore notice that some fields are greyed out if it is not applicable for you to enter or edit text at the current point in the E-portfolio workflow.

There are also boxes where a DS or collaborator can enter text in addition to a trainee, so it is important that care is taken not to delete any essential information. We recommend that when editing or adding text to a completed field, after inputting their comment, a DS or collaborator adds their name, role and date, for example: Joe Bloggs, DS, 01/09/2023.

EPD user accounts are read-only and allow them to have an overview of all trainees under their responsibility to see how they are progressing with their portfolio of evidence, which can be accessed under the 'My Trainees (EPD)' menu option. Some EPDs may also be acting as DSs for trainees, in which case in order to add, comment on or edit evidence for their designated trainees, they will need to go to the 'My trainees (DS)' menu option.



Collaborators or Practice supervisors (known as a ticketed supervisor within the E-portfolio) do not need an account for the E-portfolio. These are users who are not a trainees designated supervisor but who will observe a trainee in practice and provide them with feedback on how well they have demonstrated specific knowledge, skills, and/or attributes. Trainees should invite collaborators to relevant pieces of evidence within their E-portfolio using an e-ticket process, which is explained in [Section 4.1](#).

Relevant teams across NHS England will also have access to view the E-portfolio to monitor progress and ensure that trainees are progressing as expected. This is an essential part of NHS England's quality management role, as the statutory education body, responsible for providing national leadership for education, training and workforce development and transformation in the health sector, in England. All data contained within the E-portfolio is protected, as per requirements of the General Data Protection Regulations. Axia digital holds and Information Commissioner's Office (ICO) certificate.

## 2.4 Help and additional information

User reminders are provided throughout the E-portfolio. To access these, select the 'click to toggle' option or hover over the question mark symbols to get more details on the section you are viewing.

**NOTE:** For the best user experience, we advise you access the E-portfolio on a desktop, laptop or large tablet, as a wider screen enables the user to view all the necessary elements.

## 2.5 Session timer

If a user is inactive for a period of 35 minutes they will automatically be logged out of the E-portfolio. There is a countdown timer in the top right-hand corner of the screen.

The timer resets to 35 minutes each time the user interacts with the E-portfolio, such as clicking a button, or completing a form. If the user is typing, the page will remain active. If leaving the page for any reason, users should take care to use the 'Quick

save' function so that work is not lost if the page times out while away from the screen. For more information on saving work see [section 2.6](#).

Please note this functionality has been included to increase security of the E-portfolio.

**NOTE:** Simply moving the cursor around on the page is not considered as an interaction.

## 2.6 Saving work

There is a quick save option for each entry or evidence so trainees or DSs can save work as they go along without needing to worry that their work will be lost. To activate this function, which can be seen in an amber bar at the bottom of the screen while editing an entry, the 'Title' field MUST be completed.

Trainees and DSs can use this 'quick save' function to come back and complete the evidence when they wish and save work as many times as needed.

Trainees should avoid using the green 'Save and Complete' function (for DSs this is a green 'Sign and Complete Record' bar) until they are happy they have completed everything required for that entry and are ready to send the entry to the next stage of the E-portfolio workflow. When saving work using the green "Save and Complete" bar, users will be prompted to complete any fields marked with an asterisk ' \* ' which have been left blank. In these cases, simply entering '**N/A - [date], [initials]**' will allow the save.

When a trainee selects the green 'Save and Complete' bar, the entry is sent to the DS for comment and approval and can no longer be edited by the trainee. Once a DS has selected 'Sign and Complete Record' the record can no longer be edited and becomes read only.

## 2.7 Logging out

The 'Log Out' button can be found in the navigation menu on the left-hand side of the screen. Before logging out, ensure that all necessary work has been saved.

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

## 2.8 Deleting and restoring records

The following records can be deleted if required:

- Supervised learning events
- Contributions to care logs
- Reflective accounts
- Miscellaneous evidence uploads

This is done by going to the category for the relevant tool on the left-hand menu, choosing the entry you want to delete, and selecting the red 'Delete' button on the right-hand side.

Deleted records are not permanently deleted and can be restored by selecting 'Recycle Bin' from the left-hand navigation menu. Choose the record you wish to restore (you can search for records by typing text in the search field).

To view a deleted record, click on the title of the record.

To restore a deleted record, click on the "Restore" button next to the relevant record and confirm that you want to restore the record by selecting "Restore" when the pop-up box appears. The record will be removed from the deleted records list and can then be found in its original location including the date that it was originally completed and not the date restored.

## 3. Navigating the E-portfolio

This section provides further information on:

- The Dashboard
- The Navigation Menu

This [11-minute User Guide video](#) shows users how to navigate through some of the key elements in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

### 3.1 The Dashboard

A trainee's progress can be viewed at any point by using the Dashboard. The Dashboard can be accessed in the following ways:

- Trainees – Select 'Dashboard' from the left-hand navigation menu. The E-portfolio will also open on the dashboard when opening the E-portfolio from the 'Open Active Pathway' button.
- DSs – Select 'My Trainees (DS)' from the menu on the left-hand side of the screen, then select the name of trainee the DS wishes to view.
- EPDs – Select 'My Trainees (EPD)' from the menu on the left-hand side of the screen, then select the name of the trainee the EPD wishes to view.

The Dashboard contains the following information:

- 'NHS England Assessment Activity Progress'
  - A cumulative count of all records mapped to the NHS England Assessment Activities (Groups A-E)
  - This shows how many records have been signed off and completed
  - Hovering over the assessment activity number provides a reminder of the activity type
- 'Outcome Matrix, Trainee Actions, Absence'
  - For 'Outcome Matrix' it shows the number of signed off learning outcomes

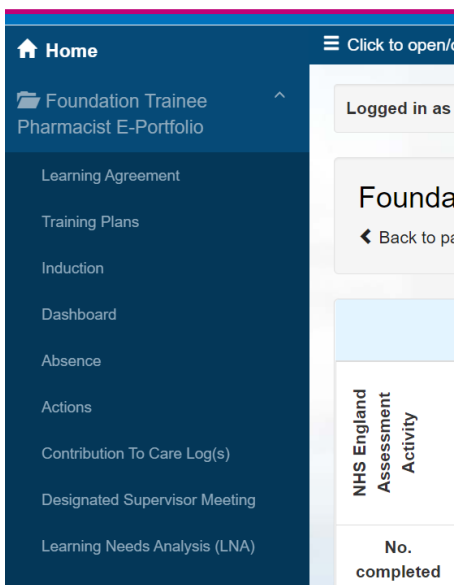
- For 'Actions' it displays a count of outstanding actions versus completed actions
- For 'Absence' there are three boxes: the first (green) shows cumulative annual leave days taken (excluding bank holidays); the second (blue) shows cumulative sick days taken; and the third box (yellow) shows total days absence for any other reason (excluding study leave, which does not count as absence for GPhC purposes).
- 'Evidence tools'
  - Each row shows the cumulative count of all started records, those awaiting Designated Supervisor sign off and completed records of each record or evidence type
  - The counts in the first (amber) box next to each type of event represents the number of records started, counts in the second (green) box represents the number of records awaiting Designated Supervisor sign off, and the counts in the third (blue) box represent the number of records completed and signed off by the Designated Supervisor.
- Feedback
  - This displays the feedback tools that can be used in the E-portfolio, along with how many records have been started (amber) and how many records have been completed and signed off (green)
- 'Training Progress Reports'
  - This displays the status of each GPhC Trainee Progress Report as either 'Not Completed', 'Satisfactory' or 'Unsatisfactory'. For more on Trainee Progress Reports refer to [section 12](#).
- 'Closing of E-portfolio'
  - This displays the status of the 'Closing of the E-portfolio Form'. For more on Closing the E-portfolio refer to [section 13](#).

**NOTE:** DSs and EPDs can see an overview summary of their trainees' progress upon clicking 'My Trainees (DS)' and 'My Trainees (EPD)' respectively. On this view, a DS or EPD will only see two numbers displayed if a trainee has started and completed an assessment activity.

**NOTE:** DSs/EPDs can see the details of the trainee at the top of the screen where it says, 'Viewing the portfolio of [trainees name]'.

## 3.2 The Navigation Menu

The navigation menu gives quick access to all relevant assessment tools forms, and progress trackers. For trainees, it appears on the left-hand side of the screen on clicking 'open active pathway' and expanding the 'Foundation Trainee Pharmacist E-portfolio' drop-down arrow. DSs and EPDs can access this navigation menu by going to 'My Trainees (DS)' or 'My Trainees (EPD)', then selecting the name of the trainee they wish to view and expanding the 'Foundation Trainee Pharmacist E-portfolio' drop down menu.



**NOTE:** The navigation menu can be hidden at any point by selecting the 'Click to open/close full menu' button situated next to the navigation menu. This is useful for devices with small screens such as mobile phones and tablets. To view the full menu, click on 'Foundation Trainee Pharmacist E-portfolio' to expand the contents.

### 3.3 Designated Supervisor Self Development Area (for DSs)

For Designated Supervisors (DS) there is a 'DS Self Development Area' which can be accessed via the left-hand navigation menu. DSs should use this space for declaring competence in their role as a DS and for uploading the relevant supporting evidence.

To do so, select 'DS Self Development Area' then 'Declaration of Competence' tab. Select 'Start New Form', complete the fields and when ready click 'Complete Record'. This will take the DS back to the 'Declaration of Competence' homepage. In order to save the record, click on the 'Edit' button of the record created and select 'Update and Complete Record' – a pop-up box will appear to confirm that the record will be updated and will appear in a view-only access.

To upload additional evidence relevant to the role of the DS, select 'DS Self Development Area' and click on the 'Evidence Uploads' tab. Select 'Start New Form' and complete all the fields and when ready click 'Complete Record'. In order to save the record, click on the 'Edit' button of the record created and select 'Update and Complete Record' – a pop-up box will appear to confirm that the record will be updated and will appear in a view-only access.

# 4. Completing Assessment Tools and Forms

## 4.1 Assessment tools and forms

There are two main ways to complete an assessment tool or form:

- Online process
  - Online process with a Designated Supervisor (DS)
  - Online process with a collaborator via an e-ticket
- Upload process

Within the E-portfolio, these processes can be started by either a trainee or a DS, although we recommend that this is primarily the trainee who leads on completing their assessment tools.

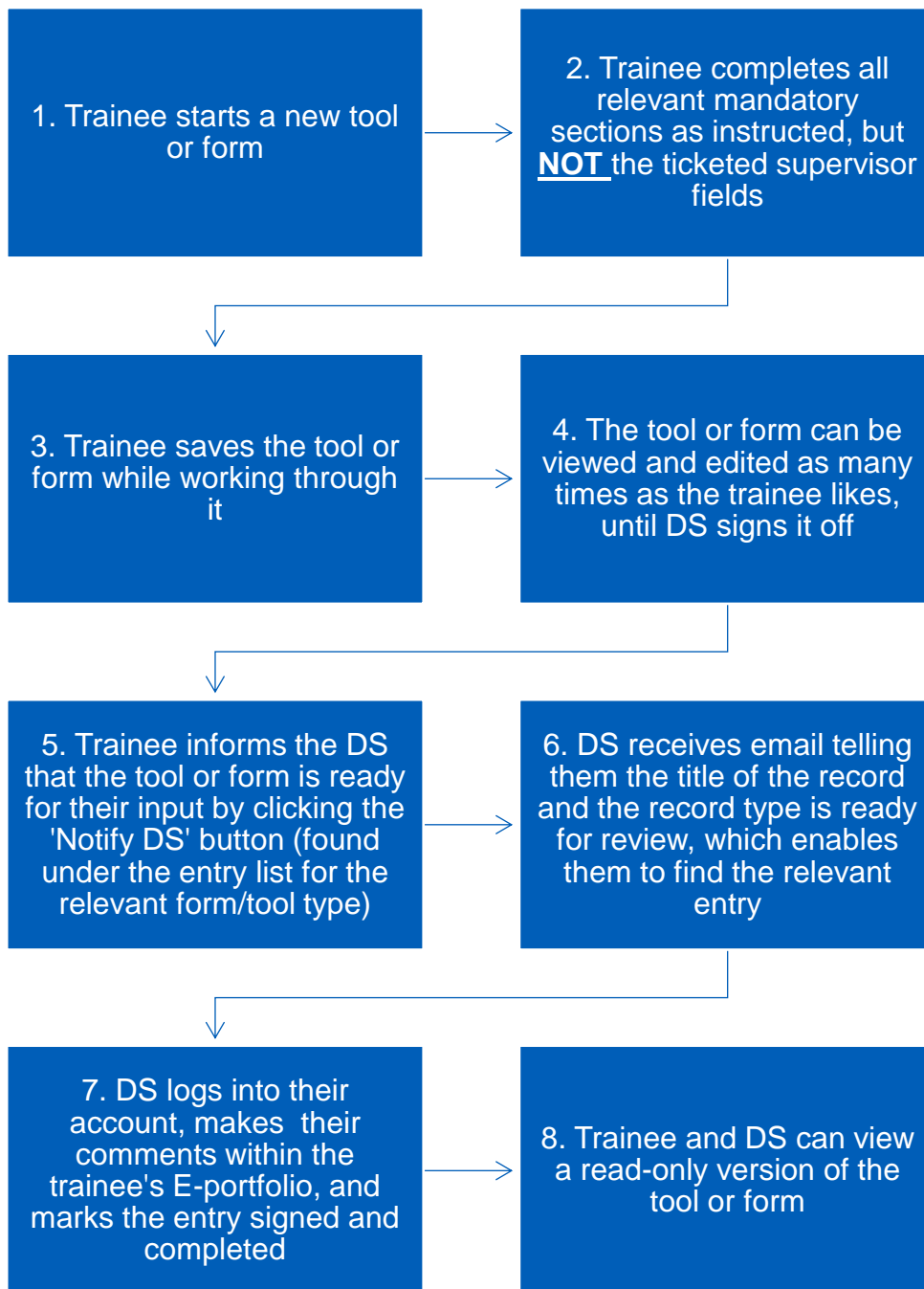
**NOTE:** The system updates your portfolio every 5-minutes. Therefore, at times, it can take up to 5 minutes for an action to be processed and seen on screen

### 4.1.1 Online process

**Online process for final review by Designated Supervisor ONLY (no ticketed supervisor involved in observation of trainee).**

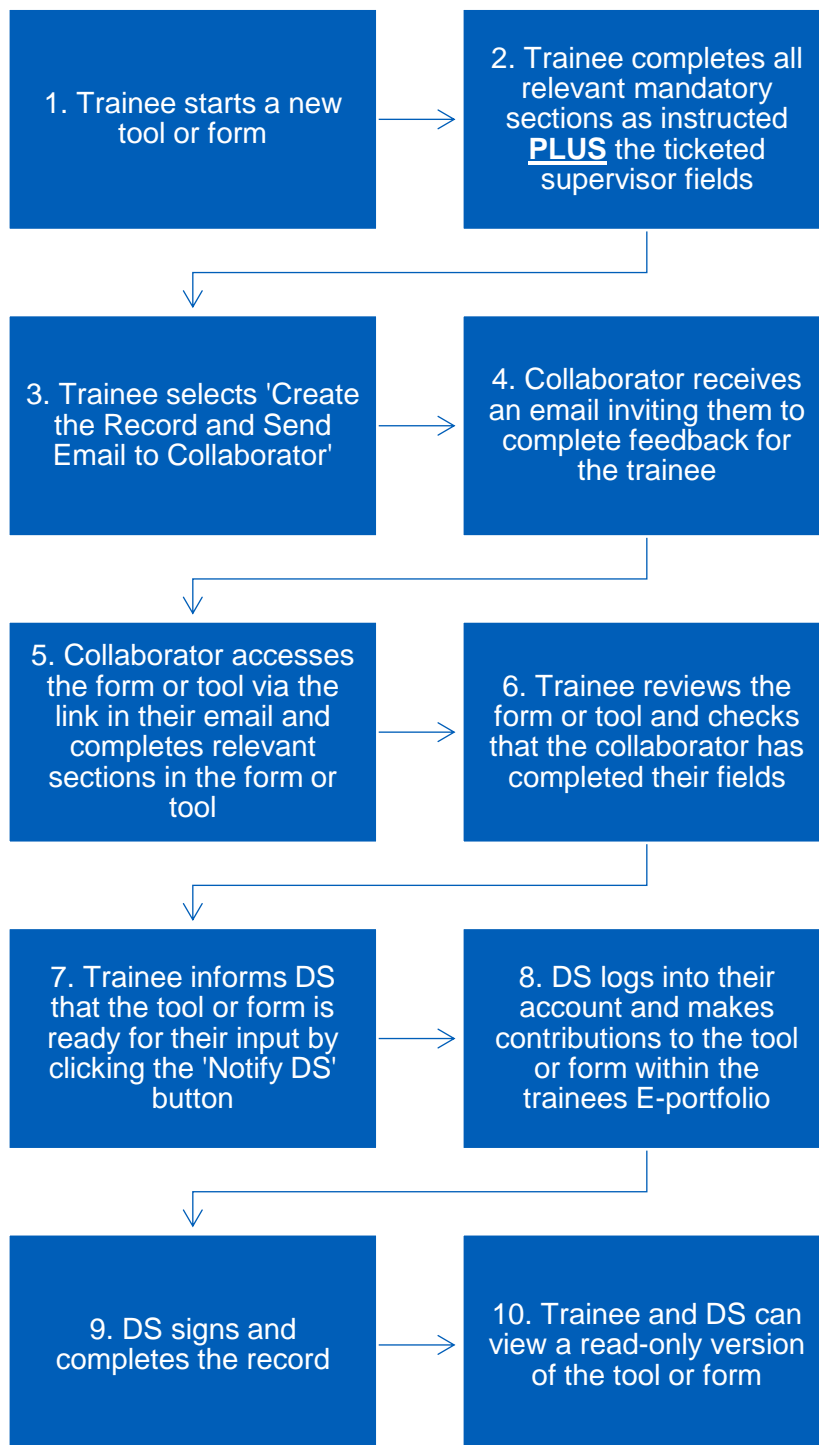
This process enables a trainee to seek feedback and sign off from their DS. The DS must have a registered account within the E-portfolio (for instructions on how to request an account, see Section xx of this guide). The process is outlined below:





## Online process for involving a Collaborator / ticketed supervisor before final DS review

This process is for a trainee 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. The process is outlined below:



This process only provides collaborators 'one-time' access to complete a single assessment tool or form. The collaborator will have 28 days to provide feedback with the e-ticket process.

If a trainee requires a collaborator to provide feedback on more than one assessment tool or form, then the trainee will need to send them a ticket for each one. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam.

Trainees can send collaborators' reminders if the email has not been received or has been deleted in error. Invites can also be cancelled if needed, for example, if an incorrect email address has been entered or if a collaborator can no longer provide feedback. These can all be done by the trainee going back into the relevant entry and choosing the "edit" button.

**NOTE:** The E-portfolio does not display details of when the invitation for a collaborator to provide feedback was sent or when feedback has been completed by the collaborator, therefore a trainee will need to log in on a regular basis and check whether the collaborator has provided feedback. If an invitation is cancelled, the email to the original 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.

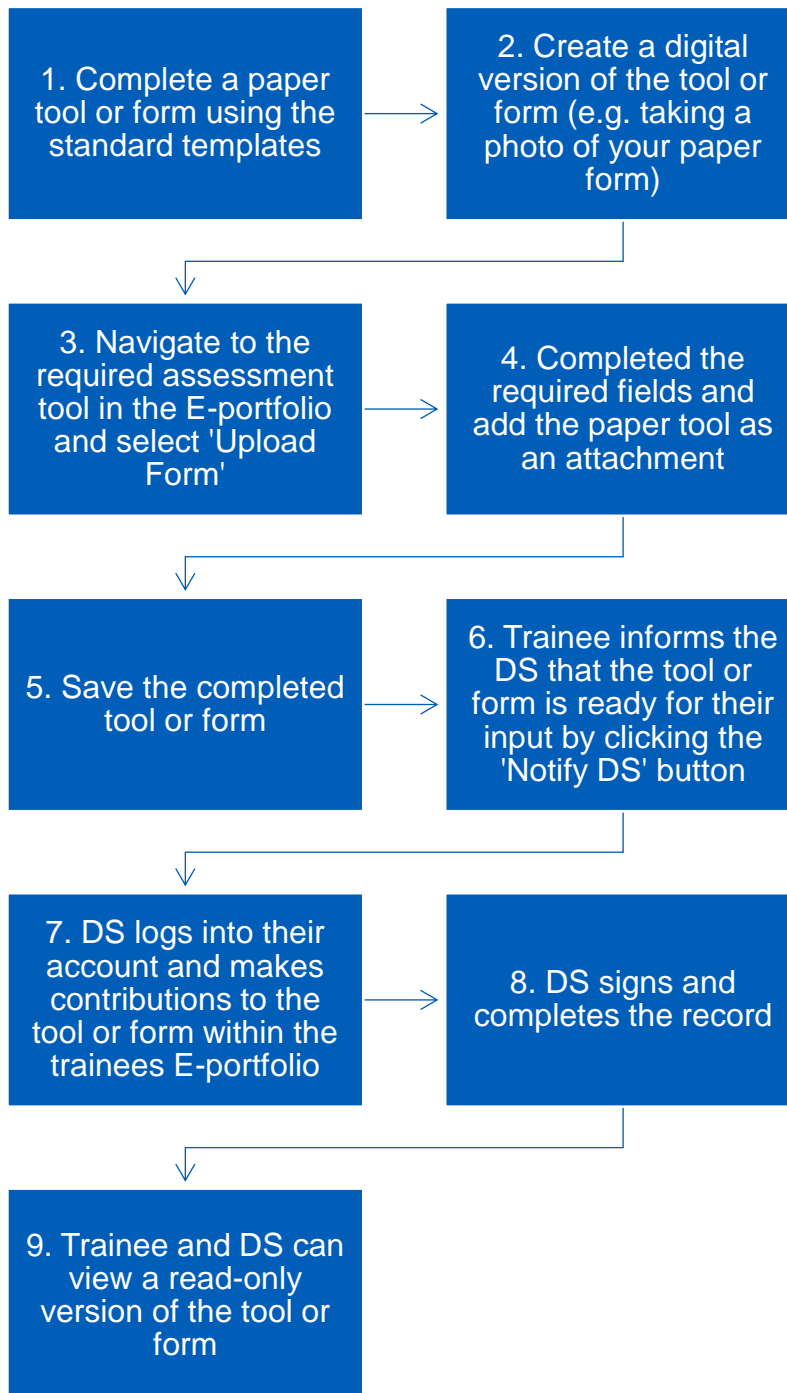
#### **4.1.2 Upload process**

In situations where a paper version of assessment tools or forms have been completed, these can be uploaded to the relevant section of the E-portfolio, so they count towards the achievement of the assessment activities and GPhC learning outcomes.

Downloadable versions of all assessment tools and forms can be found on [our website](#).

The upload process is an alternative process to the online process; both do not need to be completed. With the upload process, it is assumed that any paper versions of the assessment tools and forms are all complete therefore the e-ticket process does not apply here.

The process for uploading tools and forms is outlined below:



**NOTE:** The maximum file size for uploads is 20Mb. Trainees should ensure that uploaded files are saved locally on the device being used. Documents saved on a cloud-based service such as SharePoint or Dropbox cannot be directly uploaded.

## 5. Learning Needs Analysis (LNA)

### 5.1 Completing an LNA

To access the LNA, select 'Learning Needs Analysis (LNA)' from the navigation menu.

The LNA is to be started by the trainee pharmacist. They must:

- Complete the self-assessment column to indicate their perceived level of competence against each learning outcome (Knows how / Shows how / Does (without evidence) / Does (with evidence) / Not reviewed), taking into consideration whether they have sufficient evidence and experience to date.
- Write reflections on their experiences and evidence in the 'Trainee Reflection/ Comments' section. It is good practice for trainee pharmacists to include reflections and evidence in this space.
- Develop SMART Actions: Specific, Measurable, Achievable, Relevant, and Time-Bound

Trainees do not need to complete the self-assessment in one sitting and can come back to it having saved their work.

Once the self-assessment of all the learning outcomes and trainee reflections are complete, the trainee sends this to their Designated (by clicking the 'Notify DS' button) or ticketed supervisor (by completing the 'Ticketed Supervisor' details section) and should arrange a meeting with the supervisor to discuss the LNA.

The Designated or ticketed supervisor then reviews the trainee pharmacist's self-assessment and reflections. Based on their review of evidence to date and discussions with the trainee, they can decide whether they agree or disagree with the trainee's perception of their competence against the learning outcomes by clicking 'Agree' or 'Disagree' in the 'Supervisor agreement' column. This is an optional task for the DS and does not need to be completed in one sitting. The supervisor can click 'Save' and come back to this at another time if required.

If the supervisor does not agree they should:

- Use the supervisors' comments to document the reasoning as to why they do not agree with the trainee's self-assessment.
- Place a task in the action box.

The supervisor can use the supervisors' comments to document the discussion.

When discussing the LNA in practice, they should plan for the next period of training, which will include agreeing actions developed by the trainee, amending and adding additional actions. The Designated Supervisor can amend actions taken by the ticketed supervisor. If this is done, the Designated Supervisor should add into the comments section what they have amended and include their initials.

Once finalised the Designated Supervisor can sign off by clicking the 'Sign and Complete Record' button.

All the actions generated from the LNA can be found in the action log within the E-portfolio. Users are able to filter actions in the action log by source e.g., LNA. Refer to [section 11](#) for more on the Actions.

## 6. Recording Absence and Meetings

As part of the requirements from the GPhC, trainees need to report any absences throughout the Foundation Training Year. The 'Absence' tool within the E-portfolio allows trainees and DSs to record these for monitoring and reporting purposes.

The E-portfolio contains two forms that can be used to record meetings between the trainee and Designated Supervisor (DS) and between the trainee and other colleagues. Training progress reports are covered in [section 12](#).

### 6.1 Absence

To record absence, select the 'Absence' option from the Dashboard or Navigation Menu. Select 'Start New Form' to record a new absence. Complete the required fields as instructed. When all the required fields have been completed, select 'Save and Complete' (trainee and DS).

This [4-minute Absence Log video](#) shows users how to record absence in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

### 6.2 Designated Supervisor Meeting form

This is a form which will allow a summary and outputs of general meetings with a DS to be recorded. A downloadable version of the form can be found [here](#).

This [4-minute Designated Supervisor Meeting video](#) shows users how to record absence in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

To access the Designated Supervisor meeting form, select 'Designated Supervisor Meeting' from the Dashboard or Navigation Menu. Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been

completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

When all the required fields have been completed, select 'Save and Complete' (trainee) or 'Sign and Complete Record' (DS). Once a DS has signed and completed a record it will become read-only.

## 6.3 Other Meeting

This is a form which allows recordings of summary and outputs from any relevant meetings that contributes to the trainee's overall development. It can be started by both trainees and DSs within the E-portfolio. Collaborators can also be invited to input. A downloadable version of the form can be found [here](#).

Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

If a collaborator is to be invited to input, ensure the 'Ticketed Supervisor' section is completed with the collaborators full name and email. When the form is ready to be sent to the collaborator, select 'Create Record and Send Email to Collaborator'. The collaborator will receive an automatic email from the E-portfolio with a link to provide feedback. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam. The form will update, and confirmation will be received that the email has been sent to the collaborator.

Once feedback has been received from the ticketed collaborator, the trainee should review this and update their own comments and reflections where applicable.

When all the required fields have been completed, select 'Save and Complete' (trainee) or 'Sign and Complete Record' (DS). Once a DS has signed and completed a record it will become read-only.



## 7. Supervised Learning Events (SLEs)

The Supervised Learning Events (SLEs) tools within the E-portfolio are:

- Case Based Discussion (CBD)
- Direct Observation of Practical Skills (DOPS)
- Mini Clinical Evaluation Exercise (Mini-CEX)
- Medication Related Consultation Framework (MRCF)

They can be started by both trainees and DSs within the E-portfolio. Collaborators can also be invited to give feedback on a trainee's performance.

A downloadable version of the form(s) can be found [here](#).

There are a series of short videos which show users how to use the SLE tools in the E-portfolio. Please note these videos were recorded in 2021 and some minor updates have been made to the E-portfolio since they were recorded.

- [Introduction to Supervised Learning Events](#)
- [Case Based Discussion](#)
- [Direct Observation of Practical Skills](#)
- [Mini Clinical Evaluation Exercise](#)
- [Medication Related Consultation Framework](#)

This section describes how to complete and sign off an SLE within the E-portfolio.

### 7.1 Creating an SLE

To access any of the SLEs, select 'Supervised Learning Events' from the navigation menu.

Select the SLE to write evidence for – this example will look at Case-Based Discussion, but the same principles apply for any of the SLEs. Select 'Case-Based Discussion' from the SLE page.

Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

**NOTE:** There are some boxes and fields within the form that only certain users can complete at certain points within the E-portfolio workflow. You will therefore notice that some fields are greyed out if it is not applicable for you to enter or edit text at the current point.

### **Ticketed Supervisors/Collaborators**

If a collaborator is to be invited to give feedback, then ensure the 'Ticketed Supervisor' section is completed with the collaborator's full name and email. When the form is ready to be sent to the collaborator, select 'Create Record and Send Email to Collaborator'. The collaborator will receive an automatic email from the E-portfolio with a link to provide feedback. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam. The form will update, and confirmation will be received that the email has been sent to the collaborator.

Supplementary material can be attached to any form. Select 'Choose File', attach the required document, provide a file description and press 'Upload' underneath where the file has been uploaded. There is no limit to how many files can be uploaded. If the wrong file has been uploaded, then it can be deleted by clicking on the trash can item next to the file.

## **7.1.1 Mapping to the Assessment Activities and GPhC Learning Outcomes**

Each record must be mapped to at least one of the twenty-one Assessment Activities. This must be completed at the start of the record after the evidence details have been inputted. Select the up arrow to expand the Assessment Activities. Select those that apply.

The record must also be mapped to at least one of the 55 GPhC Learning Outcomes. This is done at the end of the form. Select the up arrow to expand each Domain of the Learning Outcomes. Select the learning outcomes that apply.

### **7.1.2 Saving the record and notifying the DS (for trainees)**

For trainees, at the bottom of the screen there is the option to press 'Save' or 'Save and Complete'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Save and Complete' if the record is completed for this SLE and you wish for your DS to review the record.

When a trainee clicks on the 'Save and Complete' button, they will be taken back to the summary page.

Trainees can then notify their DS that an SLE is ready to be reviewed by pressing 'Notify DS'. A pop-up will appear asking them to select the DS to notify. Once this is confirmed this, a message will appear notifying that an email has been sent. The status is updated to 'Notified DS'.

The DS will receive an email notification to say that a Case Based Discussion is ready for review. The DS can then go into the E-portfolio at any point to review the record by navigating to the 'Case Based Discussion' option on the left hand navigation menu. A tick will appear in the 'Ready to Review' column on the DSs E-portfolio for the entries that the trainee has notified a DS to review. If they wish to provide any comments, they can add this on the record itself after the comments the trainee has made in the relevant field. The DS should add their initials to their comment to allow differentiation.

Trainees can delete any record up until the point of notifying their DS that they are happy for them to review and sign off the evidence. Once the notify DS icon has been activated, trainees will not be able to delete a record.

### **7.1.3 Reviewing and signing off SLEs (for DSs)**

For DSs, at the bottom of the screen there is the option to press 'Save' or 'Sign and Complete Record'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Sign and Complete Record' if you are happy to sign off the record and make it read-only.

To review and sign off an SLE, navigate to the relevant tool from the navigation menu. If you are not sure which form(s)/tool(s) have been submitted for your review, the

notification email generated by the trainee will tell you. Any record that requires review and sign off will be shown by a green tick in the 'Ready for Review' column. Click on "Edit" next to the record details to review the fields, edit text as required and add in any relevant comments in fields for 'Designated Supervisor'.

**NOTE:** There are boxes where a DS can enter text in addition to a trainee, so it is important that care is taken not to delete any essential information. We recommend that when editing or adding text to a completed field, after inputting their comment, a DS adds their name and date, for example: Joe Bloggs, DS, dd/mm/yyyy.

When finished editing, select 'Sign and Complete Record'.

A pop-up window appears to confirm that the DS is happy to sign and complete record. If this is still the case then confirm by selecting 'Sign and Complete Record', or click on the 'X' to cancel the action.

The E-portfolio will update and confirm that the record has been updated.

The 'completed' column information will be populated with the DS's name and the date the record was signed off. The record will become read-only.

Once a DS has signed off a record, trainee pharmacists will be able to see any actions created from the record in the 'Actions' tab in the left-hand navigation menu.

## 8. Contribution to Care Tools

### 8.1 Contribution to Care Log(s)

This is an assessment form which will allow trainees to capture contributions they have made to the care of patients.

A downloadable version of the form is available [here](#).

This [4-minute Contribution to Care Logs video](#) shows users how to complete a Contribution to Care Log in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

#### 8.1.1 Creating a Contribution to Care Log

To access the Contribution to Care Log(s), select 'Contribution to Care Log(s)' from the left-hand navigation menu.

Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

**NOTE:** There are some boxes and fields within the form that only certain users can complete at certain points within the eportfolio workflow. You will therefore notice that some fields are greyed out if it is not applicable for you to enter or edit text at the current point.

If a collaborator is to be invited to give feedback, then ensure the 'Ticketed Supervisor' section is completed with the collaborator's full name and email. When the form is ready to be sent to the collaborator, select 'Create Record and Send Email to Collaborator'. The collaborator will receive an automatic email from the E-portfolio with a link to provide feedback. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam. The form will

update, and confirmation will be received that the email has been sent to the collaborator.

Supplementary material can be attached to any form. Select 'Choose File', attach the required document, provide a file description and press 'Upload' underneath where the file has been uploaded. There is no limit to how many files can be uploaded. If the wrong file has been uploaded, then it can be deleted by clicking on the trash can item next to the file.

### **8.1.2 Mapping to the Assessment Activities and GPhC Learning Outcomes**

The record must be mapped to at least one of the twenty-one Assessment Activities. This must be completed at the start of the record after the evidence details have been inputted. Select the up arrow to expand the Assessment Activities. Select those that apply.

The record must also be mapped to at least one of the 55 GPhC Learning Outcomes. This is done at the end of the form. Select the up arrow to expand each Domain of the Learning Outcomes. Select the learning outcomes that apply.

### **8.1.3 Saving the record and notifying the DS (for trainees)**

For trainees, at the bottom of the screen there is the option to press 'Save' or 'Save and Complete'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Save and Complete' if the record is completed for this Contribution to Care Log and you wish for your DS to review the record.

When a trainee clicks on the 'Save and Complete' button, they will be taken back to the summary page.

Trainees can then notify their DS that a Contribution to Care Log is ready to be reviewed by pressing 'Notify DS'. A pop-up will appear asking them to select the DS to notify. Once this is confirmed this, a message will appear notifying that an email has been sent. The status is updated to 'Notified DS'.

The DS will receive an email notification to say that the Contribution to Care Log is ready for review. The DS can then go into the E-portfolio at any point to review the record. If they wish to provide any comments, they can add this on the record itself.

Trainees can delete any record up until the point of notifying their DS that they are happy for them to review and sign off the evidence. Once the notify DS icon has been activated, trainees will not be able to delete a record.

#### **8.1.4 Reviewing and signing off Contribution to Care Log(s) (for DSs)**

For DSs, at the bottom of the screen there is the option to press 'Save' or 'Sign and Complete Record'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Sign and Complete Record' if you are happy to sign off the record and make it read-only.

To review and sign off a Contribution to Care Log, navigate to the relevant tool from the navigation menu.

A record that requires review and sign off will be shown by a green tick in the 'Ready for Review' column. Click on "Edit" next to the record details.

Review the fields, edit text as required and add in any relevant comments in fields for 'Designated Supervisor'.

**NOTE:** There are boxes where a DS can enter text in addition to a trainee, so it is important that care is taken not to delete any essential information. We recommend that when editing or adding text to a completed field, after inputting their comment, a DS adds their name and date, for example: Joe Bloggs, DS, dd/mm/yyyy.

When finished editing, select 'Sign and Complete Record'.

A pop-up window appears to confirm that the DS is happy to sign and complete record. If this is still the case then confirm by selecting 'Sign and Complete Record', or click on the 'X' to cancel the action.

The E-portfolio will update and confirm that the record has been updated.

The completed column information will be populated with the DSs name and the date the record was signed off. The record will become read-only.

Once a DS has signed off a record, trainee pharmacists will be able to see any actions created from the record in the 'Actions' tab in the navigation menu.



## 8.2 Reflective Account

This is an assessment form which will allow trainees to capture their reflections based on contributions they have made to the care of patients.

A downloadable version of the form is available [here](#).

This [9-minute Reflective Account video](#) shows users how to complete a Reflective Account in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

### 8.2.1 Creating a Reflective Account

To access the Reflective Account, select 'Reflective Account' from the navigation menu.

Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

**NOTE:** There are some boxes and fields within the form that only certain users can complete at certain points within the eportfolio workflow. You will therefore notice that some fields are greyed out if it is not applicable for you to enter or edit text at the current point.

If a collaborator is to be invited to give feedback, then ensure the 'Ticketed Supervisor' section is completed with the collaborators full name and email. When the form is ready to be sent to the collaborator, select 'Create Record and Send Email to Collaborator'. The collaborator will receive an automatic email from the E-portfolio with a link to provide feedback. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam. The form will update, and confirmation will be received that the email has been sent to the collaborator.

Supplementary material can be attached to any form. Select 'Choose File', attach the required document, provide a file description and press 'Upload' underneath where the file has been uploaded. There is no limit to how many files can be uploaded. If

the wrong file has been uploaded, then it can be deleted by clicking on the trash can item next to the file.

### **8.2.2 Mapping to the Assessment Activities and GPhC Learning Outcomes**

The record must be mapped to at least one of the twenty-one Assessment Activities. This must be completed at the start of the record after the evidence details have been inputted. Select the up arrow to expand the Assessment Activities. Select those that apply.

The record must also be mapped to at least one of the 55 GPhC Learning Outcomes. This is done at the end of the form. Select the up arrow to expand each Domain of the Learning Outcomes. Select the learning outcomes that apply.

### **8.2.3 Saving the record and notifying the DS (for trainees)**

For trainees, at the bottom of the screen there is the option to press 'Save' or 'Save and Complete'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Save and Complete' if the record is completed for this Reflective Account and you wish for your DS to review the record.

When a trainee clicks on the 'Save and Complete' button, they will be taken back to the summary page.

Trainees can then notify their DS that a Reflective Account is ready to be reviewed by pressing 'Notify DS'. A pop-up will appear asking them to select the DS to notify. Once this is confirmed this, a message will appear notifying that an email has been sent. The status is updated to 'Notified DS'.

The DS will receive an email notification to say that the Reflective Account is ready for review. The DS can then go into the E-portfolio at any point to review the record. If they wish to provide any comments, they can add this on the record itself.

Trainees can delete any record up until the point of notifying their DS that they are happy for them to review and sign off the evidence. Once the notify DS icon has been activated, trainees will not be able to delete a record.

## 8.2.4 Reviewing and signing off Contribution to Care Log(s) (for DSs)

For DSs, at the bottom of the screen there is the option to press 'Save' or 'Sign and Complete Record'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Sign and Complete Record' if you are happy to sign off the record and make it read-only.

To review and sign off a Reflective Account, navigate to the relevant tool from the navigation menu.

A record that requires review and sign off will be shown by a green tick in the 'Ready for Review' column. Click on "Edit" next to the record details.

Review the fields, edit text as required and add in any relevant comments in fields for 'Designated Supervisor'.

**NOTE:** There are boxes where a DS can enter text in addition to a trainee, so it is important that care is taken not to delete any essential information. We recommend that when editing or adding text to a completed field, after inputting their comment, a DS adds their name and date, for example: Joe Bloggs, DS, dd/mm/yyyy.

When finished editing, select 'Sign and Complete Record'.

A pop-up window appears to confirm that the DS is happy to sign and complete record. If this is still the case then confirm by selecting 'Sign and Complete Record' or click on the 'X' to cancel the action.

The E-portfolio will update and confirm that the record has been updated.

The completed column information will be populated with the DSs name and the date the record was signed off. The record will become read-only.

Once a DS has signed off a record, trainee pharmacists will be able to see any actions created from the record in the 'Actions' tab in the navigation menu.

## 9. Feedback Tools

### 9.1 Multi-Source Feedback Tool (MSF)

There is no limit on the number of colleagues that can be invited to provide feedback for the Multi-Source Feedback Tool (MSF). The trainee pharmacist should aim to seek feedback from ideally 10-12 colleagues - the more the better.

For more information and guidance on the purpose and use of the Multi-Source Feedback tool, refer to the resources on the [‘E-portfolio and downloadable resources’](#) webpage.

There is also a webinar available, hosted by the Royal Pharmaceutical Society and NHS England Workforce, Training & Education (previously Health Education England), which provides a demonstration of the Multi-Source Feedback tool: [HEE Foundation Training Year Webinars \(rpharms.com\)](#).

#### 9.1.1 Initiating the Multi-Source Feedback process

Select ‘Multi-Source Feedback Tool’ from the navigation menu.

To initiate the process, select ‘Start Self-Assessment’ and complete assessment as required. .

After completing the self-assessment, the trainee pharmacist should enter details of **at least** 5 colleagues to seek feedback from. Once entered the required information click ‘Save Feedback Provider’.

There is an option to edit colleagues’ details by clicking on ‘Edit’ prior to sending an invitation email. Entries can also be deleted if the colleague can no longer provide feedback. Simply select ‘Delete’ to delete them from the list. Once details have been entered, click on ‘Start feedback process and send emails to Feedback providers’.

The status of the MSF will change once all emails have been sent.

#### Status

- **Not sent yet**
- **Pending** - sent to feedback provider no action
- **Completed** - feedback provider completed and submitted

Colleagues will receive an email requesting their feedback. It is recommended that colleagues are advised to check their junk mail folder as the automatic emails can, on occasions, be filtered out as spam. The email is auto generated from [noreply@messages.axiadigital.co.uk](mailto:noreply@messages.axiadigital.co.uk).

On rare occasions, the email may not send as intended. If this happens, there is an option to “Send reminder email”, to try again.

**NOTE:** Once the feedback process has been closed, Responder details can no longer be edited or deleted, nor further names added. The trainee should ensure the minimum number of responders have completed their feedback within the agreed timeframe. In rare cases where this has not been possible, the MSF tool will need to be re-opened temporarily by submitting a support request to the RPS [eportfolio@rpharms.com](mailto:eportfolio@rpharms.com), to allow the trainee to invite the minimum number of respondents.

### **9.1.2 Adding additional colleagues**

Colleagues can be added to the responder list at any point before the agreed closing date of the tool, even if some colleagues have started to respond. Once their details have been filled in select ‘Save feedback provider’.

### **9.1.3 Extending the feedback process**

Colleagues have 30 days to complete the process, but if they need additional time then trainees can extend the feedback period by a further 30 days.

**NOTE:** The feedback process can only be extended once and will be extended for all colleagues (including those who have already provided feedback).

To extend the process select ‘Extend feedback process’.

The deadline for completion of the MSF cycle will be updated accordingly at the top of the page.

### **9.1.4 Trainee pharmacists completing the self-assessment**

Completion of a self-assessment need to be completed before the MSF gathering stage closes.

To complete self-assessment, select 'Start Self-Assessment'. The trainee pharmacist should complete all sections as instructed.

Once completed, select 'Save and Complete' to complete the process.

Confirmation will be received that the form is completed, and the form becomes read-only.

### **9.1.5 Closing the feedback process**

If all colleagues have provided feedback before the 30 days deadline, or if it is felt that a sufficient number of responses have been received, the process can be closed early to trigger the next step.

To close the process, select "Close feedback process".

The MSF gathering stage will now close, and the Designated Supervisor should review the feedback. They will be given 30 days to review the feedback and provide comments.

### **9.1.6 Reviewing feedback**

#### **Designated supervisor review**

It is the responsibility of the trainee pharmacist to monitor the feedback process. Once the feedback gathering stage is closed (either manually by the trainee or because the deadline has passed), the Designated Supervisor (DS) will review the feedback provided.

DSs can view all ratings and comments in a summary report with details of who provided each comment. The DS can also add their own comments.

Once the Designated Supervisor has completed the review process (this must be done within the 30-day allocation for this stage), the report can be published to trainee's account for them to view.

**NOTE:** If the DS has not published feedback with additional comments, the 'Summary Report' and 'Report Chart Comparison' tabs will appear blank.

### **Trainee pharmacist review**

The trainee pharmacist will receive an email informing them the MSF summary is ready to review.

Click on the Report Chart Comparison tab to view a chart of the self-assessment compared to the average ratings from colleagues.

Click on the Summary Report tab to view the detailed feedback.

The trainee pharmacist should read through all the sections, reflect on the ratings and comments, then complete the Learner Reflections and Agreed Actions fields. Click 'Save and Mark as Complete' when finished.

A new MSF can now be started.

## 9.2 Patient Satisfaction Questionnaire (PSQ)

The feedback received from the Patient Satisfaction Questionnaire (PSQ) is collated into a report which can later support a reflective discussion between the trainee pharmacist and Designated Supervisor. The PSQ maps to all the activities in Groups A and E of the Assessment Strategy and can also be mapped to the GPhC interim learning outcomes.

Further guidance about the PSQ tool can be found on the [“E-portfolio and downloadable resources”](#) webpage.

There is also a webinar available, hosted by the Royal Pharmaceutical Society and NHS England Workforce Training and Education (previously Health Education England), which provides a demonstration of the PSQ tool: [HEE Foundation Training Year Webinars \(rpharms.com\)](#)

### 9.2.1 Initiating the patient satisfaction questionnaire process

Select ‘Patient Satisfaction Questionnaire’ from the navigation menu of the E-portfolio.

To initiate a new PSQ cycle, select the ‘Start New Feedback Cycle’ button.

To generate a link/QR code which can be used by patients to provide feedback, click the ‘Generate Link/QR Code’ button.

A new QR code which is associated with this feedback cycle will be generated.

The QR code can be printed out and displayed in the trainee pharmacist’s place of work, which will enable patients to easily scan the code and be directed to the questionnaire. Alternatively, the direct link can be copied and sent to patients individually – to copy the link, click the ‘Copy Link’ button.

Each link/QR code will be valid for 60 days and can be used by multiple patients to provide feedback for this PSQ cycle. After 60 days the link will expire. A new link/QR code can be generated by clicking the ‘Generate Link/QR Code’ button on the PSQ summary page.



The counter on the PSQ summary page will show how many pieces of feedback have been collected during this PSQ cycle.

Once at least ten responses have been received or once the Designated Supervisor is satisfied with the number of responses received, the DS will close the feedback cycle and review the feedback before publishing this.

**NOTE:** The Summary Report tab will appear blank until the Designated Supervisor publishes the feedback to the trainee.

### **9.2.2 Reviewing Feedback**

Once the Designated Supervisor has closed the feedback cycle and published the feedback, comments can be reviewed by the trainee pharmacist. Previous PSQ cycles can be viewed by navigating to the 'Details' tab of the PSQ summary page. This page displays all closed PSQ cycles – clicking into any of these will show the relevant options for this specific cycle.

**NOTE:** There is a separate heat map for each cycle which can be viewed from the summary page on the report tab.

Once the PSQ cycle has been reviewed by the trainee pharmacist, it is recommended they complete a Reflective Account to articulate how the feedback will be acted upon.

By clicking the 'Add Reflection' button, the trainee pharmacist will be automatically redirected to the Reflective Account page. Refer to [section 8.2](#) for more on the Reflective Account.

This concludes the PSQ cycle – a new feedback cycle can be initiated by clicking the 'Start New Feedback Cycle' button on the PSQ summary page.

This number of PSQ feedback cycles initiated and those that have been completed will appear in the trainees Dashboard view. The number of initiated cycles is represented in an amber box, and the number of completed cycles is represented in a green box.

## 10. Miscellaneous Evidence

The Miscellaneous Evidence Upload section is for recording any other assessment activity that has been completed in practice. It is the form that should be used to record a 'supplementary evidence' assessment activity where a specific activity has been agreed between a trainee and their designated supervisor (DS) to provide evidence against a learning outcome.

A downloadable version of the form can be found [here](#).

This [4-minute Miscellaneous Evidence Form video](#) shows users how to use this tool in the E-portfolio. Please note this video was recorded in 2021 and some minor updates have been made to the E-portfolio since it was recorded.

### 10.1 Creating a Miscellaneous Evidence Upload

To access the Miscellaneous Evidence Upload, select 'Miscellaneous Evidence Upload' from the navigation menu.

Select 'Start New Form' or alternatively select 'Upload Form' if a downloadable version has already been completed. Both methods will create a new record and the form will appear. Complete the required fields as instructed.

**NOTE:** There are some boxes and fields within the form that only a trainee, DS or collaborator can complete. If this is the case, the box or field will be greyed out and the user will not be able to enter or edit text.

If a collaborator is to be invited to give feedback, then ensure the 'Ticketed Supervisor' section is completed with the collaborators full name and email. When the form is ready to be sent to the collaborator, select 'Create Record and Send Email to Collaborator'. The collaborator will receive an automatic email from the E-portfolio with a link to provide feedback. Please advise collaborators to check their junk folder as the automatic emails can on occasions be filtered out as spam. The form will update, and confirmation will be received that the email has been sent to the collaborator.

### **10.1.1 Mapping to the Assessment Activities and GPhC Learning Outcomes**

The record must be mapped to at least one of the twenty-one Assessment Activities. This must be completed at the start of the record after the evidence details have been inputted. Select the up arrow to expand the Assessment Activities. Select those that apply.

The record must also be mapped to at least one of the 55 GPhC Learning Outcomes. This is done at the end of the form. Select the up arrow to expand each Domain of the Learning Outcomes. Select the learning outcomes that apply.

When you have completed all the required fields, select “Save and Complete”.

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

### **10.1.1 Saving the record and notifying the DS (for trainees)**

For trainees, at the bottom of the screen there is the option to press ‘Save’ or ‘Save and Complete’. Selecting ‘Save’ will enable the trainee or DS(s) to come back and make amendments to the record. Only select ‘Save and Complete’ if the record is completed for this SLE and you wish for your DS to review the record.

When a trainee clicks on the ‘Save and Complete’ button, they will be taken back to the summary page.

Trainees can then notify their DS that a Miscellaneous Evidence Upload is ready to be reviewed by pressing ‘Notify DS’. A pop-up will appear asking them to select the DS to notify. Once this is confirmed this, a message will appear notifying that an email has been sent. The status is updated to ‘Notified DS’.

The DS will receive an email notification to say that the Miscellaneous Evidence Upload is ready for review. The DS can then go into the E-portfolio at any point to review the record. If they wish to provide any comments, they can add this on the record itself.

Trainees can delete any record up until the point of notifying their DS that they are happy for them to review and sign off the evidence. Once the notify DS icon has been activated, trainees will not be able to delete a record.

### 10.1.2 Reviewing and signing off (for DSs)

For DSs, at the bottom of the screen there is the option to press 'Save' or 'Sign and Complete Record'. Selecting 'Save' will enable the trainee or DS(s) to come back and make amendments to the record. Only select 'Sign and Complete Record' if you are happy to sign off the record and make it read-only.

To review and sign off a Miscellaneous Evidence Upload, navigate to the relevant tool from the navigation menu.

A record that requires review and sign off will be shown by a green tick in the 'Ready for Review' column. Click on "Edit" next to the record details.

Review the fields, edit text as required and add in any relevant comments in fields for 'Designated Supervisor'.

**NOTE:** DSs are able to overwrite text that a trainee has entered, so it is important that care is taken not to delete any essential information. We recommend that when editing or adding text to a completed field, after inputting their comment, a DS adds their name and date, for example: Joe Bloggs, DS, dd/mm/yyyy.

When finished editing, select 'Sign and Complete Record'.

A pop-up window appears to confirm that the DS is happy to sign and complete record. If this is still the case then confirm by selecting 'Sign and Complete Record', or click on the 'X' to cancel the action.

The E-portfolio will update and confirm that the record has been updated.

The completed column information will be populated with the DSs name and the date the record was signed off. The record will become read-only.

Once a DS has signed off a record, trainee pharmacists will be able to see any actions created from the record in the 'Actions' tab in the navigation menu.

# 11. Actions

This section displays a list of actions that have been generated within other assessment tools and forms. Actions can be marked as complete as the trainee progresses through their training.

**NOTE:** It can take approximately 5 minutes for actions created from tools and forms to appear in the Actions log.

## 11.1 Creating and viewing Actions

All Supervised Learning Events (SLE) forms, meeting records, other records and the Learning Needs Analysis contain an optional field called 'Agreed action', allowing the trainee to create an action as the form is completed. This will appear in the 'Actions' area.

Select 'Actions' from the navigation menu on the left-hand side of the screen.

To view more action items on a page, select 'Show' and the number of items wished to be displayed from the drop-down list. Actions can also be searched for by typing text in the search field. Actions can additionally be rearranged 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.

## 11.2 Completing Actions

Once an action has been completed, the trainee can mark it as complete by selecting 'Mark as Complete'.

A pop-up window will appear. Review the details and enter the 'Date completed'. Click on 'Mark as Complete' to save the edits. A tick will appear next to the completed action and the 'Completed Date' field will be populated.

## 12. Foundation Training Progress

This section describes how progress and sign off against the Learning Outcomes can be done by a Designated Supervisor (DS) using the Outcome Matrix within the E-portfolio.

The following two videos show how to sign off learning outcomes using the Outcome Matrix and how to complete a Progress Report in the E-portfolio. Please note these videos were recorded in 2021 and some minor updates have been made to the E-portfolio since recording.

- [Signing off Learning Outcomes](#) (7-minutes)
- [Progress Report](#) (4-minutes)

### 12.1 Outcome Matrix

The Outcome Matrix displays a count of all records completed by a trainee and signed off by the DS. It will also indicate if a GPhC learning outcome has been signed off. The Outcome Matrix can be used to identify a trainee's strengths and areas for development.

Select 'Outcome Matrix' from the navigation menu. The Assessment Activity Progress summary can be viewed at the top of the page. Hovering over the numbers 1 to 21 will provide a quick summary of each assessment activity.

Once a record has been completed and signed off by the DS, it will display on the summary table. Upon clicking on a count shaded in grey, the user will be able to see a list of all completed and signed records that have been linked to that Assessment Activity. A record can be selected to view from the list by clicking the view icon. The record will appear in a new window.

Progress with the GPhC Learning Outcomes can be viewed by scrolling down the page. Clicking on the folder icons expands the Domains.

The number of completed and signed evidences for each domain of learning outcomes can be viewed but also the number of GPhC learning outcomes that have been signed off by the DS.

The ordering of the learning outcomes on the left-hand side can be chronological (1-55) or by the number of signed evidences per learning outcome, by clicking on the filter arrows next to the title of each column. There is also an option to type in a term into the 'Search' field, so that learning outcomes with that term will then be displayed.

Upon clicking on a count shaded in green, records mapped to that learning outcome can be viewed. To view a record, click on the view icon.

DSs can sign off learning outcomes within the Outcome Matrix by clicking on the blue pencil icon (note this feature is only accessible for a DS), this will allow DSs to award a trainee a learning outcome. Once a learning outcome has been signed off, a tick mark will appear by that learning outcome and the stage of training the sign off took place.

A learning outcome can be revoked at any point by the DS if they feel that a trainee is not demonstrating a learning outcome consistently.

In the situation where a learning outcome requires un-signing, a discussion needs to take place with the DS and the trainee on what additional evidence is required to meet the learning outcome again.

**NOTE:** The Outcome Matrix can take 5 minutes to refresh and update.

## 12.2 Training Progress Reports

This is a form which will allow trainee pharmacists and their Designated Supervisor (DS) to record details of formal progress reviews (required by the GPhC) which must take place at 13, 26, 39 and 52 weeks into the Foundation Training Year. The GPhC require that trainees conduct a meeting to discuss their progress with their DS at each of these points and complete the accompanying GPhC form, which is available on the GPhC [webpage](#).

### 12.2.1 Creating and completing a Foundation Training Progress Report form – week 13 and 26

This example will look at completing a week 13 progress report, but the process is similar for completing progress reports at week 13 and 26.

To access the Foundation Training Progress Report form within the E-portfolio, select 'Foundation Training Progress Report' from the navigation menu.

Select 'Start a New Week 13 Progress Report' button to create a new record.

The form will appear. If this is a trainee's first progress report, the 'Progress Report' field will show that this is the Week 13 report, but if a previous report has been created, this field will show the next relevant week (i.e., 26, 39 or 52).

Enter in the 'Date of Report' field – this date should be the date that the trainee met with their DS to assess their progress. The 'No of Weeks Since Starting Training' field will be auto populated.

**NOTE:** Trainees do not have permissions to award a rating for the report as this is the responsibility of the DS.

When all relevant fields have been completed the trainee should click 'Save and Complete'.

Once the above steps have been performed, the DS will need to access the E-portfolio to complete the record and sign it off. Trainees should inform their DS once the form is ready for them to complete by clicking the 'Notify DS' button.



Once the progress report has been signed off by the DS, they will mark either 'Satisfactory' or 'Unsatisfactory' at this stage of the training year:

- For an 'Unsatisfactory' progress report outcome, a 'U' in an amber box will appear in the Dashboard under the corresponding progress review column.
- For a 'Satisfactory' progress report outcome, an 'S' in a green box will appear in the dashboard under the corresponding progress review column.

This outcome will be reflected on the summary page, and the trainee will be presented with the option to start the next Foundation Training Progress Report (i.e., the Week 26 report).

The result will also be reflected in the Training Progress Report area on the Dashboard.

**NOTE:** If the results of a Training Progress Report is 'Unsatisfactory' then a copy must be sent to the GPhC

### **12.2.2 Creating and completing a Foundation Training Progress Report form – week 39 and 52**

The week 39 and 52 report is very similar to the previous reports but there are some differences. Trainees will not be able to download the form from the GPhC webpage. Instead, the form needs to be completed directly from their MyGPhC portal. Trainees should also complete the relevant section in the E-portfolio regarding the week 39 and 52 progress report.

There is an additional field to complete in the week 39 report in the E-portfolio which asks, **'Has this progress report been logged within the trainee's MyGPhC?'** This is for the DS to complete. Once the trainee has completed their sections they should press 'Save and Complete'. Trainees should inform their DS once the form is ready for them to complete by clicking the 'Notify DS' button.

If the DS awards an 'Unsatisfactory' rating to a trainees Week 39, the trainee will be required to repeat the report once any issues in their practice have been addressed. Therefore, if the DS awards an 'Unsatisfactory' rating, the trainee will be presented

with an option to 'Start a New 39 Week Progress Report' within the Foundation Training Progress Reports summary page.

**NOTE:** The result of the first Week 39 and Week 52 progress reports (regardless of outcome) must be reported by the trainee to the GPhC via their [MyGPhC account](#).

**The result is not automatically sent to the GPhC through the E-portfolio.**

## 13. Closing your E-portfolio

When a trainee has been signed off as Satisfactory for their 52-week Foundation Training Progress Report, their Designated Supervisor will be able to close the E-portfolio and make it read-only. Trainees will be able to access their portfolio for a period of 5 years.

Trainees will be able to see if their DS has initiated the E-portfolio closure process from their Dashboard or via the 'Closing of E-portfolio' section accessed via the navigation menu.

If the status is 'Not Started' trainees will need to wait for their DS to initiate the process. If the status is 'Started' trainees will be able to access the form to review it.

### 13.1 Completing the closure process

To access the form, select 'Closing of E-portfolio' from the navigation bar on the left-hand side of the screen. The form can also be accessed directly by selecting 'Closing of E-portfolio Form' within the dashboard.

Designated Supervisors will need to declare the trainee has achieved the following:

- All the GPhC learning outcomes to the required level
- Passed the registration assessment
- Signed off as Satisfactory on their 52-week progress review

Once these have been completed, the DS will need to make a final declaration that they want to sign the E-portfolio off as complete.

Once this process has been completed, the status of the 'Closing of E-portfolio Form' will be updated to 'Completed' in the dashboard.

### 13.2 Downloading your certificate

Trainees will be able to download a certificate of completion once their DS has completed and signed off the 'Closing of E-portfolio Form'.

To access and download the certificate, select 'Closing of E-portfolio' from the navigation bar on the left-hand side of the screen. The form can also be accessed directly by selecting 'Closing of E-portfolio Form' within the dashboard.

Trainees should click on the "Generate PDF certificate" to download their certificate. This will open in a new tab within the browser.

**NOTE:** A copy of the certificate can be downloaded at any point.

# 14. Contact Details

## **Enquiries about your training year**

Visit the [Trainee Pharmacist Foundation Year Programme](#) for further information about your training year.

For any questions about the requirements of the foundation training year and HEE products and services please contact our dedicated support team.

Email: [traineepharmacist@hee.nhs.uk](mailto:traineepharmacist@hee.nhs.uk)

## **Technical enquiries**

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

Email: [eportfolio@rpharms.com](mailto:eportfolio@rpharms.com)

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

## **Acknowledgements**

The E-Portfolio is designed by AXIA Digital.

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## 15. Glossary

Term	Description	Explanation
Assessment Strategy	Trainee Pharmacist Foundation Year Assessment Strategy	Contains 21 activities that FTPs must achieve as part of the Foundation Trainee Pharmacist Programme. Resources to support the use of the Assessment Strategy can be found <a href="#">here</a> .
CBD	Case-based Discussion	A retrospective evaluation of a trainee pharmacist's input into patient care. It assesses clinical decision-making and the application or use of pharmaceutical knowledge in the care of patients.
Collaborator		The role of a collaborator is to authenticate and provide developmental feedback to the trainee pharmacist on specific evidence submitted. A collaborator can be any member of the pharmacy team and wider multi-disciplinary team that has been noted as a Collaborator, also known as a witness, within the e-portfolio, by the trainee. The role of the collaborator can include Practice Supervisors, Designated Supervisors, Pharmacy Technicians, Pharmacy Support Staff, Line Managers and other health care professionals.
DOPS	Direct Observation of Practical Skills	An assessment tool used to demonstrate a range of procedural skills that are essential to the provision of safe and effective pharmaceutical care.

DS	Designated Supervisors	Supervises trainee pharmacists during their foundation training year. DS's sign off assessment tools and forms, conduct reviews, and monitor overall progress. They also complete 13-week progress reviews with trainees and sign them off at the end of the programme as meeting the GPhC learning outcomes – a regulatory requirement
EPD	Educational Programme Director/Educational Lead	EPDs and Educational Leads are responsible for the monitoring of programme development and assurance that local training and or assessment meets the criteria of the HEE quality framework. As part of this, EPDs ensure mechanisms are in place to monitor trainee progress, wellbeing, and equal opportunities.
GPhC	General Pharmaceutical Council	The regulator for pharmacists, pharmacy technicians and pharmacy premises. They set the standards for foundation trainee pharmacist training and administer the pharmacist registration assessment.
IFPP	Interim Foundation Pharmacist Programme	A professional development programme designed for provisionally registered pharmacists in England, aligned to the RPS interim foundation pharmacist curriculum. By completing the programme, provisionally registered pharmacists are demonstrating that they have achieved the curriculum learning outcomes.
LNA	Learning Needs Analysis	A structured framework used to identify gaps in your learning and development. The framework would usually align to the curriculum or learning outcomes for a specific stage of practice or programme. For foundation this is the GPhC IET learning outcomes
LO	Learning Outcome	A description of skills, attributes, knowledge that a foundation trainee pharmacist must be able to demonstrate and achieve by the end of their

		foundation training year. There are 55 LOs in the General Pharmaceutical Council's initial education and training standards. Note: Learning outcome 37 is not a requirement for the 2021/22 training programme
Mini-CEX	Mini Clinical Evaluation Exercise	Assesses skills, attitudes, and behaviours essential to the provision of high-quality care. It is a snapshot of practice, involving the observation and assessment of day-to-day work.
MRCF	Medication Related Consultation Framework	A reflective assessment tool that can be used to support the development of consultation behaviours and skills. It provides a structured approach to reviewing a patient's medicines to identify any problems they may have, including how the patient adheres to their treatment.
NHS England WT & E	NHS England Workforce, Training and Education	NHS England Workforce, Training and Education is a statutory education body, responsible for providing national leadership for education, training and workforce development and transformation in the health sector.
PDP	Personal Development Plan	A structured framework to support learning and development. For this programme this will be linked to the learning needs analysis actions.
RPS	Royal Pharmaceutical Society	The professional body in Great Britain for pharmacy and pharmacists, with a key role in supporting the educational and professional development of pharmacists across all career stages. The RPS is the provider of the HEE foundation trainee pharmacist e-portfolio.
SLE	Supervised Learning Event	A set of evidence-based assessment tools to support development through formative learning. The purpose of the SLE is to:



		<ul style="list-style-type: none"> <li>• provide immediate feedback, highlight achievements, and suggest areas for further development.</li> <li>• demonstrate engagement in the educational process.</li> </ul> <p>Examples are case based discussions, mini clinical evaluation exercise, direct observation of practical skills and medication related consultation framework</p>
TP	Trainee Pharmacist	A trainee pharmacist who is completing training aligned to the <a href="#">General Pharmaceutical Council's Standards for the initial education and training of pharmacists – Interim learning outcomes.</a>

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This publication can be made available in a number of alternative formats on request.