E-Portfolio User Guide
For General Practice Transition Programme (Wales) Learners
Contents

1 Introduction ......................................................................................................................... 1
2 Using the E-Portfolio ........................................................................................................... 4
   2.1 Help and Additional Information ................................................................................. 4
   2.2 Session Timer ............................................................................................................... 4
3 Getting Started ................................................................................................................... 5
   3.1 Selecting your Programme ......................................................................................... 5
   3.2 Tutors .......................................................................................................................... 6
   3.3 User Roles .................................................................................................................... 6
4 Identifying your Development Needs ................................................................................ 7
   4.1 Learning Needs Analysis (LNA) ................................................................................. 7
      4.1.1 Completing a learning needs analysis ................................................................. 7
      4.1.2 Creating and managing tasks ............................................................................. 8
5 Recording and Planning Your Development ..................................................................... 10
   5.1 Learner Actions ............................................................................................................. 10
6 Using Learning Events to Support your Development ....................................................... 11
   6.1 Clinical Examination Skills (CES) ............................................................................. 11
   6.2 Telephone Consultation Skills (TCS) ......................................................................... 12
7 Evidence of Learning ......................................................................................................... 14
8 Continuing Professional Development (CPD) ................................................................... 17
   8.1 Planned CPD ................................................................................................................ 17
   8.2 Unplanned CPD .......................................................................................................... 19
9 Peer Discussion Form ......................................................................................................... 20
10 Reflective Account ............................................................................................................ 23
11 Useful Resources .............................................................................................................. 26
12 Reviewing your Progress ................................................................................................... 27
   12.1 Your dashboard ......................................................................................................... 27
   12.2 Framework summary ............................................................................................... 27
   12.3 End of Programme Review ....................................................................................... 29
13 Printing Records .............................................................................................................. 30
14 Contact Details .................................................................................................................. 31
15 Glossary .............................................................................................................................. 32
1 Introduction

The Royal Pharmaceutical Society (RPS) have developed an E-portfolio for General Practice learners to record their learning and development.

The E-portfolio has been designed to be flexible so you can work through the elements yourself, or as instructed by your training provider. The E-portfolio also contains forms and templates to enable you to fulfil the requirements of your training.

We will continue to update and enhance the E-portfolio to ensure that it continues to be a user-friendly, intuitive, and functional platform. Learning and development tools will also be reviewed regularly to ensure that they reflect current practice.

This is a technical user guide that outlines the main functions of the E-portfolio for learners. Users are also advised to refer to guidance from your employer and/or training provider.

We are keen to have your feedback on the E-portfolio. If you have any comments or suggestions for improvement, please contact the RPS directly. Contact details are provided at the end of this user guide.
2 Using the E-Portfolio
This section contains general information on the technical functionality of the E-portfolio.

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 notice an option to “click to toggle”.

Select this 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 your screen. This is a countdown of inactivity. If you are inactive for a period of 35 minutes, you will automatically be logged out of your portfolio.

The timer resets to 35 minutes each time you interact with the 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.
3 Getting Started

When you first access the E-portfolio, you will need to select a programme.

3.1 Selecting your Programme

Select your programme.

You will need to “request approval” to start the programme before being allowed to enter the E-portfolio.

After requesting approval and getting this accepted you can open your active programme, you will see the below home page. Here you can access all the sections relevant to your programme and add records to them. You will also have access to a menu, on the left-hand side, by clicking “General Practice Transition Programme”.

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*Image of a webpage showing the selection process and programme information.*
3.2 Tutors
You will be assigned a Tutor by the administration team. This is required before you can start using your E-portfolio.

3.3 User Roles
The E-portfolio contains tools and templates to support professional development. The table below outlines the different tools and who have access to each tool. You can find further details about the different roles in the glossary at the end of this document.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Learner</th>
<th>Tutor</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Programme Review</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>CPD Planned</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>CPD Unplanned</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>Peer Discussion</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>Reflective account</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>Evidence of Learning</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Framework summary</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Learning Needs Analysis (LNA)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Learner Actions</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>Clinical Examination Skills (CES)</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
<tr>
<td>Telephone Consultations Skills (TCS)</td>
<td>✓</td>
<td>✓ (View only)</td>
<td>✓ (View only)</td>
</tr>
</tbody>
</table>
4 Identifying your Development Needs

We have incorporated several tools to help you identify your strengths and areas for development.

4.1 Learning Needs Analysis (LNA)

The learning needs analysis enables you to assess your practice against the General Practice Pharmacist Knowledge and Capability Guide. You are recommended to complete a learning needs analysis every 6-12 months or when your practice changes significantly, such as a change in rotation, role, or responsibilities. If you are undertaking a formal training programme, check the requirements of your training provider, as they may require you to complete the learning needs analysis more frequently.

4.1.1 Completing a learning needs analysis

To complete a learning needs analysis, select the “Learning Needs Analysis (LNA)” option from the left-hand navigation menu or the “Learning Tools and Records” area on the main home page dashboard.

Select “Add New” to open up a new learning needs analysis.

Work through the sections and assess yourself against all the competencies.

You will need to indicate:
- **Learner rating**: Your current ability in demonstrating the outcome
- **Priority**: Shows the relevance of that outcome to your current practice

The ratings are *High*, *Medium* or *Low*.

Full details of all icons can be found in the table under ‘Click to Toggle’.

### 4.1.2 Creating and managing tasks
Clicking ‘add new’ in the ‘add actions’ section will enable you to create a task. You should create an action and decide the deadline by when it will be achieved. The evaluation field is to be filled in once you have carried out the action.
Your tasks are saved in the “Learner Actions” area under the heading “My Actions”.

When you have completed a task, ensure you mark the task as complete in the “My Actions” area. Find the task on your list and click on “Mark as Complete”. Enter the Date Completed and select “Mark as Completed”.

Completed tasks appear with a tick icon next to them. Each column can be sorted according to your needs by clicking on the column title.
The next section allows you to add your comments to the learning needs analysis and save any changes.

5 Recording and Planning Your Development
The E-portfolio contains tools that you can use to support your development. These can be used as required to facilitate and structure learning.

5.1 Learner Actions
This section enables you to view actions raised throughout your E-Portfolio. This is essentially a ‘to-do’ list for your learning and development.

Select the “Learner Actions” option in the navigation section in the side navigation menu.

You will see a list of actions pulled from your E-Portfolio, where you can “Mark as Complete” on a specified date, as shown above (Section 4.1.2).
6 Using Learning Events to Support your Development

Learning events tools support the development of specific knowledge, skills, or attributes. Examples are:

- Clinical Examination Skills (CES)
- Telephone Consultations Skills (TCS)

These are for you to document your attendance at relevant workshops and map to the framework. There is no requirement for your tutor to sign these off.

6.1 Clinical Examination Skills (CES)

Select the "Clinical Examination Skills" option under the "Learning Events" area of your home dashboard page or by selecting "Learning Events" from the side navigation menu.

Select “Start New Form”

Fill in the appropriate sections and tick to confirm you have attended the workshop. You can upload your certificate of attendance (if you have one) in the attachments section.

Once completed, scroll to the "Framework Mapping" section, to see the list of competencies. Select the ones you felt were achieved from this workshop.
Save the record by clicking “Create Record”.
Attachments can be added at this stage. Two additional options will also appear. “Update Record” will save any changes made and “Update and Complete Record” will save and complete the record. With this option, you will no longer be able to edit the record.

6.2 Telephone Consultation Skills (TCS)

Select the “Telephone Consultation Skills” option under the “Learning Events” area of your home dashboard page or by selecting “Learning Events” from the side navigation menu.

Select “Start New Form”

Fill in the appropriate sections and tick to confirm you have attended the workshop. You can upload your certificate of attendance, if you have one, in the attachments section.
Once completed, scroll to the "Framework Mapping" section, to see the list of competencies. Select the ones you felt were achieved from this workshop.

Save the record by clicking "Create Record".

Attachments can be added at this stage. Two additional options will also appear: "Update Record" will save any changes made and "Update and Complete Record" will save and complete the record. With this option, you will no longer be able to edit the record.
7 Evidence of Learning

This tool allows you to record your evidence of learning for the General Practice transition programme.

To start submitting your evidence select either the “Evidence of Learning” option from the side navigation menu, or “Evidence of Learning” from the dashboard.

![Dashboard Image]

This will take you to the page below. To create a record, select the “Start New Form” button.

![Evidence of Learning Page]

You will then see the below screen where you can log your evidence. The “Summary of evidence” section is for you to provide context to your evidence for your tutor.

![Evidence of Learning Form]

You will be able to add actions and attachments when you have created the record.
After completing the initial details for your Evidence of Learning you will scroll down to the Framework Mapping. Here you can select all the learning outcome(s) which your evidence will support. You can select a learning outcome by ticking the check box to the left of it.

Once you have mapped all of the applicable learning outcomes, click on “Create Record” at the bottom of the page to save your decisions.

You will then be able to “Add Actions”, “Comments” and “Attachments”.

Add actions – see section 4.1.2.

Adding a comment

You can add any comments that you want your tutor to see in this section (your tutor can also leave comments for you).

Click on the “Add Comment” option to do this.

The box below will pop up for you to type your comment then select “Add Comment”.

To attach your evidence as an attachment, please do so in the section shown below. File types that can be uploaded include Word, Excel, pdf, audio files, images. Please ensure that you remove any information
that might identify individuals (including patients) or seek appropriate consent from individuals before uploading files. (Maximum file size 25MB).

Selecting “Update Record” will save any changes made.

Please note that you will not be able to sign off these records yourself. Your tutor will assess your evidence and make the decision.

Once updated you will be able to see your Evidence of Learning record on the Evidence of Learning page. Here you can view feedback and make edits to the records.
8 Continuing Professional Development (CPD)

This section allows you to make records of any planned or unplanned learning. The forms have been aligned to the forms used by the General Pharmaceutical Council (GPhC) for revalidation.

It is vital to develop a habit of undertaking and recording CPD (planned and unplanned). CPD is an integral part of your life-long learning, and you will be required to submit records for revalidation annually.

8.1 Planned CPD
To start entering your CPD select either the “CPD Planned” option from the side navigation menu, or “CPD Planned” under the “Learning Tools and Records” section of the dashboard.

This will take you to the page below. To create a record, select the “Start New Form” button.

You will then see the below screen where you can insert the details of your CPD record.
After completing the initial details for your CPD you will scroll down to the **Framework Mapping**. Here you can select all the learning outcome(s) which your CPD record will support. You can select a learning outcome by ticking the check box to the left of it.

You can come back and edit this at any point and link your record to the learning outcomes.

Once you have mapped all of the applicable learning outcomes, click on "Create Record" at the bottom of the page to save your decisions.
You will be able to edit this record and update any changes by clicking “Update Record”. To complete the record, click the “Update and Complete Record” option. Note: You will not be able to edit this record if you select this option.

The following message will appear when you click the “Update and Complete Record” option.

Once completed you will be able to see your CPD record on the CPD planned page. Here you can make edits to the records you have not completed yet and view your completed records.

8.2 Unplanned CPD
To start entering your CPD select either the “CPD Unplanned” option from the navigation menu or “CPD Unplanned” under the Learning Tools and Records section of the dashboard.
The form and process for unplanned CPD records is similar to planned CPD records. The main differences are the fields you need to complete. The forms have been aligned to the forms used by the General Pharmaceutical Council (GPhC) for revalidation.

9 Peer Discussion Form
This tool can be used to create a record of a peer discussion that took place during your training.

You can access this from the main dashboard or left-hand navigation menu.

You can then select “Start New Form” to begin. You will then be able to “View” or “Edit” the selected record.
Complete all sections of the form.

You will be able to add attachments when you have created the record.

After completing the initial details for your Peer Discussion, you will scroll down to the Framework Mapping section. Here you can select all the learning outcome(s) which your Peer Discussion record will support. You can select a learning outcome by ticking the check box to the left of it.
Select "Create Record" to save your peer discussion.

You will then be able to add attachments if required. To save, select "Update Record" and to save and complete select "Update and Complete Record". Note: You will not be able to edit this record if you select this option.

The following message will appear when you select the "Update and Complete Record" option.

By selecting "Back" you will see a list of records that you can "view" or "edit".
10 Reflective Account

This aligns with GPhC revalidation requirements.

You can start a new reflective account from your main home dashboard or the left-hand navigation menu.

Select “Start New Form” to start a new record.

You will need to complete all the sections before selecting “Create Record”.
You will be able to add attachments when you have created the record.

After completing the initial details for your Reflective Account, you will scroll down to the **Framework Mapping** section. Here you can select all the learning outcome(s) which your Reflective Account record will support. You can select a learning outcome by ticking the check box to the left of it.

Select **Create Record** to save your reflective account.

You will then be able to add attachments if required. To save, select **Update Record** and to save and complete select **Update and Complete Record**. Note: You will not be able to edit this record if you select this option.
The following message will appear when you select the “Update and Complete Record” option.

By selecting “Back” you will see a list of records that you can “view” or “edit”.
11 Useful Resources
This section contains a list of useful documents and templates to support you with your learning and development. Completed forms and templates can be uploaded into the “Evidence of Learning” section.

To view these, select “Useful Resources” from the side navigation menu.

Useful Resources
A list of useful documents and templates to support your learning and development.
Completed forms and templates can be uploaded to the ‘Evidence of Learning’ section.

<table>
<thead>
<tr>
<th>Useful Resources</th>
<th>Please select a Useful Resources to view from the &quot;Useful Resources&quot; menu to the left.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultation Peer Review</td>
<td></td>
</tr>
<tr>
<td>GP Pharmacist Enquiry</td>
<td></td>
</tr>
<tr>
<td>GP Pharmacist Programme</td>
<td></td>
</tr>
<tr>
<td>Acute Presumption Process</td>
<td></td>
</tr>
</tbody>
</table>
12 Reviewing your Progress
You can review your progress at any point by using the dashboard and framework summary.

12.1 Your dashboard
The learner’s dashboard provides an overview of your progress. It provides a snapshot of the number of tools and records completed.

Clicking on any of the counts or status notes will take you to a list of all records for the relevant section. You will then be able to click on the title of each record to view further detail.

12.2 Framework summary
We have aligned the tools within our E-portfolio to the General Practice Transition Programme knowledge and capability guide. For each tool you will be asked to map your learning and development to the learning outcomes in the knowledge and capability guide. This provides structure for your on-going development.

The framework summary provides you with an overview of each tool and/or record mapped to the General Practice Transition Programme knowledge and capability guide.

Select “Framework Summary” from the navigation menu to view the details.

![E-portfolio screenshot](image)

As you scroll down the page you will see the types of tools and records that have been mapped to each learning outcome. Darker shaded circles are counts of records associated with the outcome. If the tool or record has not been mapped to the outcome the circle will be displayed in a lighter shade of grey. The first number displayed is the number of completed records and the second number is the total records created.
You can view a list of records associated with each outcome by clinking on the count next to each outcome.

A pop-up box will appear with a list of the records. Click on the view icon 🎌 to view the full record.

The record will be displayed in read-only format. If files have been attached to the record you will also be able to click on the link and view the file.
The Framework Summary displays the competencies in order of sign off date.

3 months – 3m  
6 months – 6m  
12 months - 12m

You can rearrange the order by clicking on the headings of each column.

12.3 End of Programme Review

When the framework has been signed off by your tutor, you will then be able to access the “End of Programme Review”. This must be done in the correct order, starting with you.

Learner > Tutor > Programme Lead.

This is a declaration to confirm that you have completed all the necessary records and requirements for the GP transition programme.

Start by selecting either the “End of Programme Review” option from the side navigation menu, or “End of Programme Review” under the “End of Programme” section of the dashboard.

You will see the screen below where you can tick the box under ‘Learner Declaration’. Then select the ‘Submit’ button.

When you have completed this, your tutor will then be able to confirm their declaration. The final declaration will be by the Programme Lead and when this has been confirmed, a certificate will appear on your e-portfolio.
**13 Printing Records**

If you need to print any records you can print the page by right clicking on your mouse to bring up the options dialogue window, then select "Print".

This will generate a print friendly pdf document.
14 Contact Details


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

If you have any queries about the General Practice Transition Programme, please contact HEIW.

Acknowledgements

RPS E-Portfolio designed by AXIA
AXIA Digital, Suite 58, Batley Business Park, Batley, West Yorkshire, WF17 6ER
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
<td>An individual who is using the E-portfolio for their learning and development.</td>
</tr>
<tr>
<td>Tutor</td>
<td>An individual who supports a pharmacist with their learning and development, who may or may not be based in the same workplace.</td>
</tr>
<tr>
<td>Employer</td>
<td>Individual or organisation employing a pharmacist.</td>
</tr>
<tr>
<td>Administrator/Programme Lead</td>
<td>HEIW – approving requests, final sign off when complete to generate certificate</td>
</tr>
<tr>
<td>Registered user</td>
<td>A user registered on RPS website who does not have an RPS membership account.</td>
</tr>
<tr>
<td>Learning Event (LE)</td>
<td>A learning and development tool that supports the development of specific knowledge, skills, or attributes.</td>
</tr>
</tbody>
</table>