



Annual CPD Portfolio

A Guide to Recording, Submission and Assessment

Revised June 2024

For CPD submission 2024 – 2025 onwards

Table of Contents

Continuing Professional Development	03
Benefits of undertaking annual CPD activity	04
CPD Framework 2021 requirements (revised June 2024)	05
Key changes (as amended June 2024)	06
Summary of requirements for CPD portfolio submissions	08
Submission Criteria Checklist	10
Meeting the CPD Framework essential criteria	15
Scheduled and Unscheduled cycles	16
The 4 CPD Domains	16
Recording your CPD cycles	18
Portfolio Assessments	
• Selection Process	25
• Assessment Process	25
Assessment Outcomes	27
Consensus Guidance for assessment of CPD portfolios	28
Feedback statements from assessor to registrant	
• General Feedback	32
• Reflection – Criteria 1 & 2	33
• Planning – Criteria 3	33
• Action – Criteria 4	34
• Evaluation – Criteria 5 & 6	35
Signposting to further resources	36

Continuing Professional Development (CPD)

Undertaking CPD is a professional and ethical requirement for all registrants of the Pharmaceutical Society NI. The importance of CPD and the essential part it plays in maintaining registration is emphasised in the CPD Regulations 2012

“... continuing professional development which registered persons are required to undertake in order to have their name retained in the register and to maintain competence ...”

Registrants are obliged to maintain and develop professional knowledge, skills and competences by observing the following requirements:

- practise only when you are competent and fit to do so;
- identify development needs, undertake CPD relevant to your scope of practice and maintain appropriate records;
- keep your knowledge and skills up to date, evidence-based and relevant to your scope of practice; and
- apply your knowledge and experience appropriately to your scope of practice.

The aim of this guide is to provide registrants with an understanding of CPD and how learning associated with CPD should be documented in order to meet the statutory requirements of the regulatory body.

On reading this you should:

- understand what CPD is and what the Regulator expects registrants to do to meet their statutory obligations.
- be able to list the four stages within a CPD cycle;
- be aware of the methods to identify learning needs;
- know how to document CPD of relevance to your pharmacy role;
- have an understanding of the evaluation criteria used to assess cycles; and
- have viewed and reflected on “real-life” CPD cycles.

All registrants must undertake CPD activities relevant to their scope of practice and to the safe and effective practice of pharmacy.

All registrants are encouraged to read the revised CPD Framework 2021, establish their responsibilities and plan their learning activities to ensure that they are ready to make their annual CPD portfolio submission by 31 May each year (unless otherwise directed by Council).

The CPD year runs from 01 June to 31 May (unless otherwise directed by Council).

The benefits of undertaking annual CPD activity

Benefits to you, as a pharmacist, include:

- improving your performance and confidence in your current job;
- helping you to keep up to date with new treatments, techniques, organisational changes and ways of working;
- improving your ability and confidence to respond positively to change;
- making your learning more effective;
- enhancing your career progress by continually improving your skills and knowledge;
- providing evidence of your ability when applying for jobs (some employees are asking to see CPD portfolios at interview); and
- providing evidence that you are meeting the ethical and statutory requirements of your regulatory body, the Pharmaceutical Society NI.

Benefits to your employer include:

- Improving staff performance;
- Improving staff retention;
- Meeting the organisation's objectives; and
- Meeting the Clinical and Social Care Governance agenda.

CPD is about the identification of training needs, taking account of organisational development and facilitating achieving these personal and professional needs and development of the organisation's staff.

Employers should provide support to pharmacists by developing procedures which support CPD, providing development opportunities (particularly those that can be experienced in-house), assisting with resources and expertise and by giving positive encouragement and recognition.

Benefits to patients include:

- improved patient care;
- increased patient and public confidence in pharmacy healthcare professionals; and
- increased patient expectations that pharmacists are committed to providing high standards of patient care and high-quality pharmaceutical care services.

Your portfolio

CPD Framework 2021 requirements – revised June 2024



Note: Unscheduled cycles must only pass criteria 4 – 6.

Key changes between former CPD Framework 2021 and the Revised CPD Framework 2021 (as amended June 2024)

Cycle layout

Cycles can now be recorded on a page-by-page basis and the registrant can begin at any stage of the cycle. Moving between pages using the 'Next' button ensures the information added is automatically saved. There is no longer the need to add dummy text into a section of the cycle to be able to move to the next part.

Word count

The character count of 2250 characters has been replaced by a maximum 500 word count. At the bottom right of each text box can be found small diagonal lines which allow you to expand the size of the box to enable you to read the full information added to the box.

Unscheduled Cycles

There is no longer the requirement to record all four domains of the learning cycle (reflection, planning, action and evaluation).

An unscheduled learning cycle does not start with a prior identified learning need and is often a reaction to circumstances that emerge during day to day working. This requires immediate action and activity.

For unscheduled learning cycles there is no requirement to record the reflection and planning stages. **Only action and evaluation stages are required.**

This in turn means **only criteria 4 – 6 must be met** when recording unscheduled cycles.

Recording of time spent on an activity.

This is now in hours and blocks of 15 minutes, as opposed to onerous decimal point calculations.

Evidence

There are now two evidence buttons to make the recording of evidence more meaningful, as follows:

Evidence Type – a drop down box allows for the selection of the type of evidence available and should be selected accordingly:

- Certificate
- Notes/Handouts
- Other

Evidence – a drop down box allows for the selection of the specific learning and should be selected as follows:

- NICPLD
- E-learning

- Course/Workshop
- Self-Study
- Other

If you completed a NICPLD course and received a certificate of completion, then you would select certificate in evidence type and NICPLD in evidence sections.

Print Function

A print function is now available, allowing you to print out your cycles.

Unfinished/Incomplete Cycles

As you can create cycles and move around from page to page in any order we want to ensure you do not submit a cycle unless all the information required is recorded. On the cycle home page, you are alerted to this by a yellow triangle with a white exclamation mark in its centre. This informs you that you must go back into the cycle and complete it prior to submission.

Communications from the CPD portal

A number of generic emails are now available from the portal and will automatically be sent if you have been:

- Selected for assessment
- Not selected for assessment

If you have been selected for assessment you will receive an email advising when the assessment process is complete and feedback is available.

Summary of requirements for CPD portfolio submission

Element	Requirements
Recording & submission of cycles	Recorded and submitted via Regulator Online CPD portal - portal.psn.org.uk The option for hard-copy submission remains ¹ . A hard copy CPD cycle form will be provided by the CPD Department if the Registrar advises a handwritten submission is acceptable.
Portfolio hours	Full annual portfolio Minimum of 30 hours' CPD activity – no documentation time ² Partial annual portfolio³ Minimum of 15 hours' CPD activity – no documentation time Remediation (Reassessments 1 & 2) Minimum of 10 hours' CPD activity – no documentation time
Portfolio cycles	Full annual portfolio Minimum of 4 and maximum of 10 cycles Partial annual portfolio Minimum of 4 and maximum of 10 cycles Remediation (Reassessments 1 & 2) 3 CPD cycles
Essential criteria	6 criteria – all of which are essential criteria with the exception of unscheduled cycles
Scope of Practice	A minimum of 75% of CPD cycles must relate to current scope of practice.
Scheduled/Unscheduled CPD activity	A minimum of 50% of CPD cycles must relate to scheduled activity. A maximum of 50% of CPD cycles may relate to unscheduled activity.

¹. A hard copy CPD cycle form will be provided by the CPD Department if the Registrar advises a handwritten submission is acceptable. Hard copy portfolios must be submitted, in duplicate folders (1 anonymised), before the stipulated deadline for the current CPD year to our offices at 73 University Street, Belfast, BT7 1HL.

² Pharmacists submitting more than 30 hours of CPD activity may be asked to specify the cycles, amounting most closely to the 30-hour minimum requirement, that they want considered for assessment.

³ Submission of a partial portfolio is permitted only where the Registrar has granted same via the Extenuating Circumstances process.

Evaluation	Full & partial portfolios A minimum of 75% of the total number of cycles must be directly evaluated within pharmacists' current practice and environment. This allows up to 25% of the total number of cycles to have the learning outcomes evaluated using simulated practice or by evaluating their application to a situation in future practice or sectors. Remediation (Reassessments 1 & 2) A minimum of 2 of the 3 cycles must be directly evaluated within pharmacists' current practice and environment. This allows up to 1 cycle to have the learning outcomes evaluated using simulated practice or by evaluating their application to a situation in future practice or sectors.
Percentage required to meet standard	Full & partial annual portfolio Minimum 50% - this must include: At least 50% of the number of submitted cycles⁴ and Those cycles that meet standard must contain at least 50% of all CPD hours submitted. Remediation (Reassessments 1 & 2) Minimum 50% - this must include: At least 50% of the number of submitted cycles⁵ and Those cycles that meet standard must contain at least 50% of all CPD hours submitted.
CPD evidence	If selected for assessment, pharmacists must provide any additional supporting evidence, if requested by the Registrar, and by the deadline specified. Any documentary evidence provided should be verifiable by a third party, where appropriate. Any documentary evidence should have personal details, including name, registration number, address etc redacted, to maintain anonymity. Function available to upload CPD evidence at the time of recording CPD cycles.

⁴ For example, for a portfolio of 4 cycles comprising 30 hours' CPD activity, at least 2 cycles must meet standard and those 2 cycles must comprise at least 15 hours' CPD.

⁵ For example, for a portfolio of 3 cycles comprising 10 hours' CPD activity, at least 2 cycles must meet standard and those 2 cycles must comprise at least 5 hours' CPD activity.

Your Portfolio

Submission criteria checklist

The following checklists aim to assist registrants in ensuring that their portfolio is compliant with the submission criteria.

The following statistical requirements are calculated by ROL based on data input from registrants. ROL permits portfolios meeting the statistical requirements to be submitted. However, assessment may reveal that some of these statistics are false due to the incorrect data input by the registrant. Registrants are advised to check the accuracy of the following elements prior to submitting their portfolio.

Table 1: Annual Portfolio statistical requirements

Portfolio Element	Criteria	Statistical Inaccuracy	Assessor's Outcome
Cycles	4 minimum 10 maximum	N/A	N/A
Hours	Full – 30 hrs Partial – 15 hrs	Inclusion of hours for application of learning or learning undertaken outside the relevant CPD year	Deduction of hours from portfolio total. Where this results in the portfolio hours falling below the number required for submission, the portfolio will be marked Not Met Standard . Registrant will move to Reassessment 1 .
Scheduled Learning Cycles	50% minimum	Incorrect identification (tick box) of an unscheduled cycle as a scheduled cycle	Recalculation of scheduled percentage. Where this results in the portfolio percentage falling below the submission requirement, the portfolio will be marked Not Met Standard . Registrant will move to Reassessment 1 .
Learning within scope of practice (cycles)	75% min	Incorrect identification (tick box) of CPD being within current scope of practice	Recalculation of scope of practice percentage. Where this results in the portfolio percentage falling below the submission requirement, the portfolio will be marked Not Met Standard . Registrant will move to Reassessment 1 .
Learning evaluated directly in practice/working environment (cycles)	75% minimum	Incorrect identification (tick box) of CPD having been evaluated directly in practice (within the working environment)	Recalculation of the Direct Evaluation Percentage. Where this results in the portfolio falling below the submission requirement, the portfolio will be marked Not Met Standard . Registrant will move to Reassessment 1 .

Table 2: Reassessment 1 portfolio statistical requirements

Portfolio Element	Criteria	Statistical Inaccuracy	Assessor's Outcome
Cycles	3 cycles	N/A	N/A
Hours	10 hrs	As per Table 1	As per Table 1. The portfolio will be marked Not Met Standard . Registrant will move to Reassessment 2 .
Scheduled Learning Cycles	50% minimum	As per Table 1	As per Table 1. The portfolio will be marked Not Met Standard . Registrant will move to Reassessment 2 .
Learning within scope of practice (cycles)	75% min	As per Table 1	As per Table 1. The portfolio will be marked Not Met Standard . Registrant will move to Reassessment 2 .
Learning evaluated directly in practice/working environment (cycles)	66% minimum	As per Table 1	As per Table 1. The portfolio will be marked Not Met Standard . Registrant will move to Reassessment 2 .

Table 3: Reassessment 2 portfolio statistical requirements

Portfolio Element	Criteria	Statistical Inaccuracy	Assessor's Outcome
Cycles	3 cycles	N/A	N/A
Hours	10 hrs	As per Table 1	As per Table 1.
Scheduled Learning Cycles	50% minimum	As per Table 1	As per Table 1.
Learning within scope of practice (cycles)	75% min	As per Table 1	As per Table 1.
Learning evaluated directly in practice/working environment (cycles)	66% minimum	As per Table 1	As per Table 1.

Reassessment 2 is the final remedial stage. Where statistical inaccuracies are identified, the next steps for the registrant will be at the sole discretion of the Registrar who will evaluate such instances on a case by case basis.

Table 4: Early CPD portfolio submission requirements

Rejoining Status	Portfolio Requirements
Pharmacists whose names have been restored to the Register having been previously removed for non-compliance with the CPD Framework	4 cycles (min) – 10 cycles (max) 30 hours' CPD activity Statistical requirements and assessor's outcome where statistical inaccuracies apply (see Tables 1 – 3)
Pharmacists who have rejoined the Register having voluntarily withdrawn in a previous CPD year but not having submitted a CPD portfolio for that year	4 cycles (min) – 10 cycles (max) 30 hours' CPD activity Statistical requirements and assessor's outcome where statistical inaccuracies apply (see Tables 1 – 3)
Pharmacists who have joined/rejoined the Register having neither worked as a pharmacist nor been registered with another regulator within the previous 12 months	3 cycles 10 hours' CPD activity Statistical requirements and assessor's outcome where statistical inaccuracies apply (see Tables 1 – 3)

Meeting the CPD Framework essential criteria

- Reflection
- Planning
- Action
- Evaluation

Under each of these domains, registrants must demonstrate how they **identified**, **planned** and **actioned** their learning activities in response to an identified learning need. Registrants must then demonstrate how the learning has been applied and **evaluated** in the context of their current scope of practice and environment.

The **exception** to this rule is the recording of **unscheduled cycles** where only the **action and evaluation** domains must be completed.

During assessment, the CPD assessors will ask the following questions to identify if each CPD cycle has met the essential criteria.

Table 5: CPD essential criteria for successful submission

Reflection (scheduled cycles only)	1. Did the pharmacist identify a specific learning need(s)? 2. Did the pharmacist describe why they wanted to learn about this (the context for the learning activity)?
Planning (scheduled cycles only)	3. Did the pharmacist describe the learning activity/activities they plan to complete to meet the learning need(s)?
Action (scheduled and unscheduled cycles)	4. Did the pharmacist include a summary of the related activities they have completed to meet the learning need(s)?
Evaluation (scheduled and unscheduled cycles)	5. Did the pharmacist evidence how their practice has changed or will change after meeting the specific learning? 6. Is it evident that the learning identified has/have been fully addressed within the specific cycle?

Scheduled cycles

CPD comprises a range of activities which contribute to your development and promote a reflective approach to learning and practice, where you identify learning needs relevant to your area of practice and activities to address these learning needs.

Under the revised CPD Framework 2021, registrants are required to document all four stages of the CPD cycle for scheduled learning.

Unscheduled cycles

Under the revised CPD Framework 2021, registrants are now only required to document the action and evaluation stages of a CPD cycle.

Scheduled and unscheduled learning – What's the difference?

Scheduled Learning – this learning is planned learning, where a prior learning need has been identified and is addressed through a planned and structured approach.

CPD cycles should be scheduled to address an identified learning need relating to your current scope of practice and environment.

At least 50% of CPD cycles must relate to scheduled learning.

Scheduled cycles must meet the 6 essential criteria under the four domains of learning.

Unscheduled learning – this learning is unplanned and does not start with a prior identified learning need.

It is often a reaction to circumstances that emerge during day to day working and which often requires immediate action, activity and outcomes.

A maximum of 50% of CPD cycles may relate to unscheduled learning activities.

Unscheduled cycles must meet criteria 4 – 6 under the domains of action and evaluation. There is **no requirement to meet criteria 1 – 3**.

The 4 CPD Domains

Reflection

A key part of CPD is the **identification of specific learning needs**. This is achieved through self-evaluation and reflection upon your practice. If you identify the right needs and undertake the right learning, you will see improvements in your practice.

Reflection is thinking about what you have done in your practice, how you have done it and how you could do it better or differently in the future.

The identification and specification of the learning need(s) are the two essential factors in determining whether you have met this criterion.

How to identify learning needs

There are various ways to reflect on and identify your learning and development needs, including but not limited to:

Critical incident analysis – learning from a situation that did not go according to plan. Reflect on what went wrong and why, and what could you do differently or better in the future? Do you need to acquire knowledge or develop a new skill?

Feedback from others – discussing your practice and learning needs with colleagues may be useful, as your perception of yourself and your performance may differ from that of others. Colleagues input may occur by way of informal discussion, peer review or annual appraisal.

Reading, workshops etc – reading publications and participating in workshops or study groups will also help you reflect on your learning needs.

Personal SWOT analysis – undertaking a personal SWOT analysis will help you to identify your personal strengths, weaknesses, opportunities and threats.

Personal development plan (PDP) – drawing up a PDP can help you to identify your career goals which you can revise throughout the year.

Planning

Once you have identified your learning needs, you must decide on which method of learning you want to undertake. Some may be more appropriate for you, depending on your preferred learning style.

Learning activities can include, but are not limited to:

Workshops	Speaking with peers	Mentoring	Teaching
E-learning	Conferences/webinars	Projects	Writing
Study groups	Presentation preparation	Research	Learning by doing
Private reading	University courses	Work shadowing	

Choose the learning methods that are best for you and ensure that your planned activities are **specific, achievable, realistic and time-limited**.

Action

Within the action stage of your CPD cycles, you must provide details of:

- what each specific learning activity was
- the start date and completion date
- the number of hours spent on the learning activity
- a list of the evidence and evidence type that you can provide, if requested, demonstrating your participation in the learning activity/activities.

You may, if you wish, also upload your evidence.

Evidence can include:

- certificate of attendance at a conference, webinar or workshop
- certificate of completion of an e-learning course

- copy of a presentation with your personalised notes
- copy of the reading material with your personalised notes

The provision of CPD evidence is not mandatory at this time. However, the Registrar may ask for sight of your evidence at any time, which you must provide within a set timeframe.

You should also be in a position to summarise what you have learned in relation to your identified learning needs.

Evaluation

In this stage of your CPD cycle, you must evidence how you have met your original learning needs. In order to do so, you must consider the following:

- have you met your learning needs?
- how has your practice changed or how will your practice change as a result of your learning?
- have you applied your learning within your scope of practice or environment? (direct evaluation)
- if you have been unable as yet to apply your learning, how would you do so in future? (future evaluation)
- are you satisfied that your identified learning need(s) has/have been fully addressed?

Although you can record a 'simulated/future application of learning' in relation to a **maximum of 25% of your CPD cycles**, you should aim to apply your learning directly to your practice and within your working environment, so that there is a tangible outcome or benefit to your patients and to your practice.

If you found it difficult to meet your learning needs, you may wish to consider the following:

- was the learning need appropriate?
- was the learning need too general – not sufficiently specific?
- was the learning activity undertaken appropriate to adequately meet the identified learning need?

Recording your CPD cycles

Regulator OnLine (ROL) is the Pharmaceutical Society NI's portal for all regulatory functions, including the submission of CPD.

ROL should be used for your annual CPD submission. To access ROL, please follow <https://portal.psni.org.uk/Account/Login>

If you are unable to submit via the portal, you must advise the Registrar of your situation through the CPD department (cpd@psni.org.uk). If the Registrar agrees to you submitting in hard copy, you will be provided with the relevant proforma and instructions for submission.

We will now walk through what to consider when writing up a CPD cycle

Cycle name	Name your CPD cycle in line with the CPD learning subject matter.
Scheduled/Unscheduled	Indicate if the cycle is scheduled or unscheduled by selecting the appropriate tick box. Scheduled CPD cycles must meet the 6 essential criteria under the 4 domains of successful learning. All phases – Reflection, Planning, Action and Evaluation must be written into the cycles. Unscheduled CPD cycles must meet the essential criteria 4 – 6 under Action and Evaluation only. There is NO requirement to record reflection or planning as by the nature of an unscheduled cycle it happens ‘in the moment’. Scheduled cycles must total at least 50% of your overall portfolio and unscheduled cycles must not exceed 50%. Ensure that you select the correct tick box as, if selected for assessment, an inaccuracy in this element may result in your portfolio being marked Not met standard.
Within current scope of practice	Indicate if the cycle is within your current scope of practice by selecting the appropriate tick box. In considering CPD cycles for inclusion in your portfolio, you should take account of the range of your current scope of practice and environment. <i>Ensure that you select the correct tick box as, if selected for assessment, an inaccuracy in this element may result in your portfolio being marked Not met standard.</i>
Relevant to the safe and effective practice of pharmacy	Indicate if the cycle is relevant to the safe and effective practice of pharmacy by selecting the appropriate tick box.

Reflection

1. I identified the following specific learning need(s)	Specific is the key word: • Make a clear statement of learning intent followed by specific learning needs: Example: <i>"I need to learn / to know / to gain knowledge of / to improve / to understand / to find out about / to familiarise myself with ..."</i> • Keep your learning needs focused and limited to two or three. • Ensure that learning needs are specific, precise, succinct and measurable. • Avoid ambiguous statements such as 'the main issue' or 'the latest development', etc.
2. I wanted to learn about this because (give the context for learning activity/activities)	Briefly describe the circumstances/context that led to you identifying the learning need(s): Examples: <i>"I discovered, on reading an article in the Pharmaceutical Journal on the risk factors associated with heart disease, that I needed to learn more about ..."</i> <i>"A patient presented with the classic symptoms of and I needed to source guidance about ..."</i> <i>"A pharmacy contractor decided to run a smoking cessation campaign within the store, so I need to know ..."</i> General statements such as "I feel I need to know" are insufficient and should be accompanied by further explanation.

Planning

I plan/planned to complete the following learning activity/activities to meet the identified learning need(s) (Please describe the learning activity/activities and the planned completion date(s))	• Identify a specific and achievable completion date for the learning activity/activities. • Give specific information about the planned learning activity/activities. Generalisations such as “I will attend a workshop” are not acceptable. Specific details are required. Examples: <i>“I plan to order and complete the NICPLD distance learning package ‘Evidence-based Management of Diabetes’”. (scheduled)</i> <i>“I plan to attend the ‘1st International Meeting on Pulmonary Hypertension’ in Belfast on xx/xx/xx”</i> <i>“I identified the as a resource for information on the use of for this patient” (unscheduled)</i> • Do not include within your cycle any activity that would constitute an application of learning eg delivering training, writing an SOP etc. • All dates for completion of CPD learning must fall within the date parameters of the current CPD year.
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Action

(Within this part of the cycle all fields must be completed unless marked as optional)

In meeting the identified learning need(s), I completed the following learning activity/activities	Activity Give full details of each learning activity eg “<i>reading document xxx</i>”, etc. The details should be such that the assessor can source the learning activity. Hours State the number of hours spent on the specific activity. Do not include any hours for the activity which constitutes the application of learning as, if selected for assessment, an inaccuracy in this element may result in your portfolio being marked Not met standard Start and End Date State the activity start and end dates. Evidence Type Select the evidence type from the dropdown box. Upload of this is currently optional. Ensure you add additional activity lines until all activities for the cycle have been included. Evidence Select the evidence from the dropdown box provided. Evidence Upload (optional) Upload the evidence that you can provide to demonstrate your participation in this learning activity as selected in evidence type dropdown. Documentary evidence should be verifiable by a third party, where appropriate. Summary of what you have learned Provide a brief summary of what you have learned. It is not adequate to state that you have learned without giving the specific details. Listing or summarising course contents or activity undertaken is not acceptable. Give a summary, with specific detailed examples, of learning clearly related to each of the identified learning needs. Avoid generalisation – be specific. Ensure that sufficient detail has been provided to demonstrate depth of learning and that you have completed the learning. Relate the learning to the identified learning need(s).
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Evaluation

Having met the specific learning need(s) identified, my practice will change as follows:	Give a clear example of how learning has or will be implemented – or – how your practice has changed or will change as a result of this learning undertaken. Give sufficient depth of information to demonstrate an impact on your practice. State when and how you applied or will apply the new learning. Example “I have applied my learning by preparing and delivering a lecture on medication safety to hospital pharmacists. The material studied provided many useful examples of medication errors and drug calculations, which I included in my lecture.” (direct evaluation) Or “I plan to apply my learning by preparing and delivering a lecture on medication safety to hospital pharmacists. The material studied will provide many useful examples of medication errors and drug calculations, which I plan to include in my lecture.”
I confirm that the identified learning need(s) has/have been fully addressed in this CPD cycle	Select the relevant tick box. NB: Having clearly identified specific learning need(s) at the reflection stage, you should ensure that you have mapped the learning need(s) from reflection, through the planning, action and evaluation stages.
Confirmation of direct or simulated/future evaluation	Select either the direct or simulated/future evaluation tick boxes. Your selection of direct or simulated/future evaluation must reflect the application of your learning described above. Ensure that you select the correct tick box as, if selected for assessment, an inaccuracy in this element may result in your portfolio being marked Not met standard.
Confirmation of your Scope of Practice	• Select as appropriate
Recently returned to practice	• Select as appropriate
Change in scope of practice	• Select as appropriate

Please note if the cycle is unscheduled, only the action and evaluation domains require completion. Remember to complete all other relevant tick boxes.

Submission of Portfolio

The portal is open for submission of your CPD portfolio throughout the CPD year. Once submitted you can add, remove or amend your portfolio up to midnight on 31 May. It is vital you remember to submit your portfolio of work before the closing date, regardless of whether you submit many times, making changes as you go along, or you make one final submission which you do not change. The last submission you make is the portfolio that will be accepted as your CPD submission for the CPD year.

Should you make a change to your portfolio after submission this will automatically un-submit your portfolio. Ensure you resubmit your portfolio after you have made any changes to the content, no matter how small/minor.

Portfolio Assessments

Selection Process

CPD portfolios are submitted by 31 May each year unless otherwise directed by Council. Council directs the Registrar in relation to the size of the overall assessment sample – usually 10% of submitted portfolios.

The process for selecting portfolios for assessment is a combined approach with a focused selection and a random selection which includes, but is not limited to:

- a random selection of a proportion of all CPD portfolios submitted;
- all, or a random selection of a proportion of late CPD submissions;
- a random selection of a proportion of portfolios submitted by pharmacists who have recently rejoined the Register, having not practiced as a pharmacist for a period of 12 months or more, and
- a random selection of a proportion of portfolios submitted by pharmacists who have changed their scope of practice within the CPD year.

Each registrant will receive an automatic email from the ROL CPD portal advising if they have or have not been selected for assessment.

Assessment Process

Once the selection process is complete, the selected portfolios are randomly assigned to our team of independent CPD assessors (IAs).

Portfolios are identified by an ID number only to ensure the identity of the registrant is unknown to the assessor.

The assessment process is as follows:

Annual Portfolio	Assessment Outcome	Next Steps
Assessment 1 1 st IA	Portfolio meets standard Portfolio does not meet standard	No further steps Move to Verification Assessment
Verification 2 nd IA	Portfolio meets standard (IAs differ on outcome) Portfolio does not meet standard (IAs agree on outcome)	Moves to Arbitration Assessment Moves to Reassessment 1
Arbitration 3 rd IA	Portfolio meets standard Portfolio does not meet standard	No further steps Moves to Reassessment 1

The Annual Portfolio assessment results are released as soon as all the above assessments have completed. This process takes approximately 8 – 10 weeks. Registrants being assessed are emailed, advising that results and assessor feedback are available on ROL.

Registrants who have moved to Reassessment 1 are required to submit a new portfolio comprising 3 CPD cycles totalling 10 hours within a period of 9 weeks. CPD learning must be undertaken from the start of the new CPD year, 1st June.

Reassessment 1

Reassessment 1	Assessment Outcome	Next Steps
Assessment 1 1 st IA	Portfolio meets standard Portfolio does not meet standard	No further steps Move to Verification Assessment
Verification 2 nd IA	Portfolio meets standard (IAs differ on outcome) Portfolio does not meet standard (IAs agree on outcome)	Moves to Arbitration Assessment Moves to Reassessment 1
Arbitration 3 rd IA	Portfolio meets standard Portfolio does not meet standard	No further action Moves to Reassessment 2

Registrants who have moved to Reassessment 2 are required to submit a new portfolio comprising 3 new CPD cycles totalling 10 hours within a period of 9 weeks.

CPD learning must be undertaken from the start of the new CPD year, 1st June.

Cycles that did not meet standard in Reassessment 1 cannot be reworked and submitted again for consideration in the Reassessment 2 stage.

Reassessment 2

Reassessment 1	Assessment Outcome	Next Steps
Assessment 1 1 st IA	Portfolio meets standard Portfolio does not meet standard	No further steps Move to Verification Assessment
Verification 2 nd IA	Portfolio meets standard (IAs differ on outcome) Portfolio does not meet standard (IAs agree on outcome)	Moves to Arbitration Assessment Moves to Reassessment 1
Arbitration 3 rd IA Binding result	Portfolio meets standard Portfolio does not meet standard	No further action Moves to Registrar. The final decision is at the discretion of the Registrar. This may include the commencement of the statutory process to remove the registrant from the Register.

To meet standard, CPD portfolios that are assessed must achieve a mark of 50% or more in terms of cycles and hours.

Assessment Outcomes

Assessment Result	Outcome	Action
At least 50% of cycles met standard and those cycles contained at least 50% of all CPD hours submitted.	Portfolio met standard	No further action required
At least 50% of cycles met standard BUT these cycles contained less than 50% of all CPD hours submitted	Portfolio did not meet standard	The registrant will move to the next stage: Assessment 1 to Reassessment 1 Reassessment 1 to Reassessment 2 Reassessment 2 to Registrar's Decision
Less than 50% of cycles met standard	Portfolio did not meet standard	The registrant will move to the next stage: Assessment 1 to Reassessment 1 Reassessment 1 to Reassessment 2 Reassessment 2 to Registrar's Decision

Consensus Guidance for Assessment of CPD Portfolios – CPD Year 2024 - 25 onwards

Criteria	Best Practice	Acceptable Practice	Non-Acceptable Practice
<u>CRITERIA 1</u> <u>Scheduled cycles only</u> Did the pharmacist identify a specific learning need(s)?	Clear statement of learning intent followed by bulleted specific learning needs. Specific, precise, succinct, measurable. No ambiguity.	Review/update/revisit plus at least one specific learning need identified. Specific means that there enough detail to identify a clear learning need. For example, I want to learn more about xx with specific details. Assessor to provide feedback on best practice – Yes or No statement.	Review/update/revisit without any specific learning need identified. Ambiguous statements such as: ‘ .. the main issue ..: ‘... the latest development ..,’ ‘...the key issue...’ Assessor to provide feedback on best practice.
<u>CRITERIA 2</u> <u>Scheduled cycles only</u> Did the pharmacist describe why they wanted to learn about this (the context for the learning activity)?	Learning is contextualised with a clear trigger/prompt for the learning need.	‘I feel I need to know more about ...’ with an explanation of the underlying source of the emotion. Assessor to provide feedback on best practice – Yes or No statement.	No clear explanation of why you wanted to learn/how you identified the learning need. “I feel I need to know more about ...” without further explanation given. Assessor to provide feedback on best practice – Yes or No statement.

<u>CRITERIA 3</u> <u>Scheduled cycles only</u> Did the pharmacist describe the learning activity/activities they plan to complete to meet the learning need(s)?	Full details relating to the learning activity that would allow an assessor to independently source that specific learning activity. Please note that specific names of colleagues are not required – job titles are sufficient to demonstrate the expertise of the tutor. Completion date or timeframe should be stated	Less detailed information eg ‘a workshop’, ‘an article’, ‘a course’, ‘an internet search’. Further detail must be present within the CPD cycle or could be obtained from the evidence declared eg copy of presentation, notes made on documentation Within the CPD cycle, full details are provided relating to at least one learning activity that would allow an assessor to independently source that specific learning activity Other learning activities do not have full details provided within the cycle. Assessor to provide feedback on best practice – Yes or No statement.	Less detailed information eg ‘a workshop’, ‘an article’, ‘a course’, ‘an internet search’, but no further detail is present in the cycle Assessor to provide feedback on best practice – Yes or No statement.
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<u>CRITERIA 4</u> <u>All cycles</u> Did the pharmacist include a summary of the related activities they have completed to meet the learning need(s) identified?	Full details relating to each learning activity that would allow an assessor to source the learning activity plus completion date, time and evidence. Please note that specific names of colleagues are not required – job titles are sufficient to demonstrate the expertise of the tutor. Brief summary with examples of personal learning in relation to each learning need. Summary relates to the learning need(s). Summary contains specific detailed examples (multiple) of personal learning.	Full details relating to at least one learning activity that would allow an assessor to independently source the learning activity plus completion date, time and evidence. Please note that generic titles such as a website address or NICE guidance along with therapeutic topic area is sufficient. Less detailed information about at least one learning activity but further details available elsewhere in the cycle plus completion date, time and evidence. A summary of learning that does not relate to the learning need (will not meet criteria 6) At least one specific example of personal learning need achieved. Specific means that there is enough detail to identify at least one clear learning outcome with no ambiguity. Eg I now know more about this subject is not sufficient on its own. Assessor to provide feedback on best practice – Yes or No statement.	No learning activity identified. Only recorded application to practice. Not applicable (N/A) recorded in evidence section of activity table. Date/time/evidence sections not completed. Very generic phrases – ‘the internet’, ‘a workshop’ which would not allow an assessor to independently source the learning. No personal learning demonstrated or lack of sufficient depth of learning identified. Summary of contents of learning activity. Assessor to provide feedback on best practice – Yes or No statement.
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<u>CRITERIA 5</u> <u>All cycles</u> Did the pharmacist evidence how their practice has changed after meeting the specific learning needs identified?	Clear example of implementing learning/changing practice Demonstration of transition as a result of learning activity – ‘Now I can’ Specific examples of how the learning has been applied or will be applied to future practice (note that max 25% of cycles can evaluate learning using simulated practice or application in future practice or sectors).	Less specific example of how the learning has been applied or will be applied in future practice. ‘I use/will use this in my practice/future practice by/when/if ...’ There must be at least some specific information to identify how it would be applied for example in a specific scenario if it arose. ‘I feel that I can now ...’ but with justification provided as to why the individual feels that way. The narrative must include some detail on how they feel they would apply the learning. Assessor to provide feedback on best practice – Yes or No statement	‘I feel that I can now ...’ with no justification as to why the individual feel that way. Generic statement relating to use in practice/future practice eg ‘I use/will use this in my practice/future practice’ but without details of when and how they apply/will apply their new learning. Assessor to provide feedback on best practice – Yes or No statement.
<u>CRITERIA 6</u> <u>All cycles</u> Is it evident that the learning need(s) identified has/have been fully addressed within the specific cycle?	Each learning need is clearly mapped through reflection, planning, action and evaluation stages of the cycle (with the exception of unscheduled cycles)	At least one learning need is identifiable as being mapped through reflection, planning, action and evaluation stages of the cycle. Assessor to provide feedback on best practice – Yes or No statement	No single learning need can be mapped through all stages of the cycle. Assessor to provide feedback on best practice – Yes or No statement

Feedback statements from assessor to registrant following assessment of portfolio.

General feedback for the cycle overall

The cycle has not met the required acceptable criteria. The Pharmaceutical Society of Northern Ireland provides resources on its website to aid registrants in completing their CPD and providing support to ensure cycles meet the required criteria. Registrants are encouraged to review the resources available before further cycle submissions.

This cycle is an excellent example of best practice in CPD cycle submission.

This cycle has no identified learning need(s) and, therefore, could have been recorded as an unscheduled learning cycle.

When recording CPD activities, registrants should remember the key pieces of information required at the four stages of the cycle.

Reflection

Record the learning need and how it was identified.

Planning

Plan an activity to meet the learning need. Set realistic, appropriate and achievable objectives and make the learning time-limited.

Action

Provide a summary of what was learned in the course of the learning activity and include examples of personal learning, sufficient enough with clear examples to show a depth of learning.

Evaluation

Evaluate if each learning need has been met and whether practice has changed or will change. Give specific examples of the impact of the CPD learning on professional practice either now or some stage in the future.

This cycle has been incorrectly recorded as an 'unscheduled learning cycle' instead of a 'scheduled learning cycle'. Unscheduled learning is unplanned and unexpected. Scheduled learning is planned and intentional.

All CPD activities should be undertaken and recorded within the CPD year to which the CPD portfolio period relates, that is 1st June to 31st May in the given submission year.

When recording CPD information, registrants should not include any information which might identify an individual to the assessor. Job titles, places of work and company names should remain vague. This is to protect the registrant's anonymity with the nominated peer assessor.

REFLECTION

Criteria 1

This cycle has not met Criteria 1

In the reflection stage, it is **best practice** to make a clear statement of learning intent followed by specific learning needs

In the reflection stage, registrants should identify SPECIFICALLY what needs to be learnt – this will result in subsequent entries in the planning, action and evaluation stages becoming more relevant and focused.

In the reflection stage, aim to break big topics into smaller, achievable chunks of learning. This will result in subsequent entries in the planning, action and evaluation stages becoming more relevant and focused.

In the reflection stage, using verbs such as ‘review’, ‘update’, ‘learn about’ or ‘revisit’ without identifying a specific learning need does not meet acceptable criteria.

In the reflection stage, it is **best practice** to ensure learning needs are specific, precise, succinct and measurable. Ambiguous statements such as ‘the main issue’, ‘the latest development’, ‘the key issue’ followed by a non-specific statement does not meet acceptable criteria.

Criteria 2

This cycle has not met Criteria 2

In the reflection stage, it is best practice to contextualise learning with a clear trigger/prompt for the learning need.

In the reflection stage, it is best practice to record how the learning need was identified. No clear explanation of why the Registrant wanted to learn/how a need was identified does not meet acceptable criteria.

In the reflection stage, no context/circumstances that lead to the identified learning need(s) has been documented.

Documenting ‘I feel I need to know more about ...’ or similar wording without further explanation does not meet acceptable criteria.

PLANNING

Criteria 3

This cycle has not met Criteria 3

In the planning stage, best practice is to plan an appropriate activity to meet the identified learning need with a specific and achievable completion date identified.

In the planning stage, registrants should clearly document any learning activity or activities that they plan to undertake. It is best practice to provide full details relating

to the learning activity that would allow an assessor to source the learning activity independently.

Generic vague planned activities such as ‘a workshop/article/course’ but with no further information detailed either in the planning section or elsewhere in the cycle does not meet acceptable criteria.

In the planning stage, registrants should only provide details of the planned CPD learning activity and not an activity that would be undertaken as a consequence of the CPD learning. For example, delivering training, developing a protocol, etcetera belongs in the evaluation stage as this is the application of learning.

ACTION

Criteria 4

This cycle has not met Criteria 4

In the action stage, all fields in the activity table (date/time/evidence sections) must be fully completed. Acceptable forms of evidence, for example a course certificate, personal notes, etcetera must be noted in the evidence column. However, this uploading of evidence, at present is optional. Registrants should keep this evidence as assessors may ask for this to be submitted to demonstrate the cycle was completed.

Recording “N/A” in the evidence column does not meet acceptable criteria.

In the action stage, it is best practice to provide full details relating to each learning activity. For example, “online course” without reference to where or who is delivering that course does not meet acceptable criteria.

Claiming CPD hours for an activity which is an application of CPD learning to one’s practice does not meet acceptable criteria. For example delivering training or developing a protocol based on one’s learning belongs in the evaluation stage.

In the action stage, registrants should record what was learnt as a result of undertaking the learning activity and relate this specifically to EACH of the identified learning needs in the reflection stage.

Recording information relating to the application of learning does not belong in the action stage. This information belongs in the evaluation stage – when the CPD activity has been completed.

In the action stage, it is not acceptable to record completing a test or assessment, for example, a MCQ, as a learning activity. This is an application of learning completed as a result of undertaking the CPD activity.

It is best practice to provide a brief summary (with specific examples) of personal learning clearly related to EACH of the identified learning needs in the reflection stage. It is insufficient to state broad generic statements of what has been learned without specifics. Registrants must summarise what has been learned showing sufficient depth of learning to justify the hours claimed. For example, the summary

of learning might include: “I learned that the common side effects of drug X are ...” instead of “I learned about the side effects of drug X” without specific examples of those side effects to demonstrate the learning.

This cycle does not provide a summary of learning in sufficient depth to demonstrate the registrant has completed the learning and therefore does not meet acceptable criteria. It is not sufficient or acceptable to simply provide a crude list or summary of contents of a course or activity which was undertaken or completed.

EVALUATION

Criteria 5

This cycle has not met Criteria 5

It is best practice to provide a clear example of how learning has been implemented or will be implemented OR how practice has changed or will change as a result of learning undertaken. It should provide a depth of information which clearly shows an impact on practice.

Documenting “I feel that I can now” with no justification of why the registrant feels that way, does not meet acceptable criteria.

Generic statements relating to the use in practice or in future practice but without details of when and how they apply or will apply the new learning does not meet acceptable criteria.

No clear application to practice or change in practice either now or in the future is identified in this cycle and thus it does not meet acceptable criteria.

In Evaluation, the registrant has mentioned implementing or how they will implement learning not referenced previously as part of their learning need(s) in the Reflection or Action stage.

The registrant has ticked that they have applied their knowledge already in practice but indicated in the Evaluation stage that it applies to future practice. The registrant should ensure that they accurately tick whether learning has already been applied or whether it applied to future practice.

Criteria 6

This cycle has not met Criteria 6

Specific learning needs were not identified at the Reflection stage and thus the registrant is unable to demonstrate which learning need(s) have been addressed within the cycle. Therefore, it does not meet acceptable criteria.

It is **best practice** for registrants to clearly map ALL learning needs through the reflection, planning, action and evaluation stages of the cycle.

The registrant has not clearly mapped each of the learning needs through the reflection, planning, action and evaluation stages of the cycle. At least one learning

need is required to be mapped through all four stages for the cycle to meet acceptable criteria.

Signposting to further resources

Additional resources are available on the Pharmaceutical Society NI website, as follows:

Frequently asked questions

Generally acceptable and unacceptable Extenuating Circumstances

Extenuating Circumstances Documentary Evidence