



**Royal
Pharmaceutical
Society**
of Great Britain

Plan and Record for Pharmacists and Pharmacy Technicians

Version 1.4

Published July 2009

Contents

Introduction.....	2
What is CPD and why is it important?	3
Compulsory standards.....	4
The CPD cycle and how it works.....	5
Recording formats – paper or online?	7
Frequently Asked Questions (FAQs).....	8
Support and useful contacts.....	10

Appendices

Clinical governance in the NHS.....	Appendix 1
Master record sheets.....	Appendix 2
Exemplar record sheets.....	Appendix 3
Personal Development Plan.....	Appendix 4
Self-assessment of entries.....	Appendix 5
Competencies.....	Appendix 6

Introduction

Welcome to the Royal Pharmaceutical Society of Great Britain's (the Society's) system for Continuing Professional Development (CPD).

Since January 2005 pharmacists and registered pharmacy technicians have made an annual declaration when registering stating their compliance with the Code of Ethics requirement to maintain a CPD record. On 1st March 2009, the Society introduced professional standards and guidance for mandatory CPD. You should go to page 5 (the *Compulsory Standards* section), for more information on this.

Every pharmacist and pharmacy technician is performing CPD all the time, just by learning new things and staying up to date with their job.

Recording your CPD gives you the opportunity to demonstrate to employers, patients and service users that you are maintaining and building on your capabilities.

This Plan & Record is provided as a guide to help you do this. Our approach to CPD puts you in control of your learning.

You direct your learning by identifying what you need to learn, choosing activities to undertake to meet them, and putting what you have learnt into practice.

This document explains the framework within which you can manage your learning, provides examples of good practise, and explains how to record your CPD.

What is CPD and why is it important?

CPD is a continual process of life long learning. It follows a cycle of four stages; reflection, planning, action and evaluation. It includes everything that a pharmacist or pharmacy technician learns which makes him or her better able to do his or her job. An in-depth explanation of the CPD cycle is provided in *The CPD cycle and how it works* on page 6.

The CPD cycle enables you to update, maintain and develop your capabilities by:

- Helping you identify your individual learning needs.
- Recognising the learning that occurs in the workplace, whether formally or informally, perhaps just by having a conversation with your colleagues.
- Acknowledging that everyone learns in a variety of different ways and that you will have your own preferred methods.
- Avoiding the need to complete a fixed number of hours of CPD, or stick to a formal learning structure.

CPD focuses on a range of activities, how they affect you and the way you work. Anything which helps you to improve as a pharmacist or pharmacy technician can count, including:

- Learning knowledge and skills on conferences and courses
- Practice-based learning, including feedback from patients and audits
- Analysis and review of critical incidents (your own experiences)
- Self-directed learning including reading, writing or undertaking research
- Learning with others e.g. talking to colleagues or going to workshops

Your CPD should reflect the work **you** do as a pharmacist or pharmacy technician. A pharmacy manager's record might reflect managing, coaching, or training skills being developed. Equally, if for example you work in industry, your record should reflect that, with perhaps more focus on legislation or new technology. However, although other professional development may be included, the emphasis should be on development within the pharmacy profession.

Useful definitions

Continuing Education: CE refers to traditional methods of learning such as attending workshops, study days or courses. These activities can be very useful and will inevitably feature as part of most pharmacists' or pharmacy technicians' CPD, but not all CPD is made up of CE. Less formal learning counts too.

Continuing Professional Development (CPD): a continual process of lifelong learning.

CPD record: made up of several CPD entries and consists of every entry you have written since you began recording your CPD. You must use one of the Society's approved formats for recording your CPD. Every pharmacist or pharmacy technician has only one CPD record.

CPD entry: made about one piece of learning you have done; it can start at any stage in the CPD cycle and should always end at 'Evaluation'.

Compulsory standards

Since January 2005 pharmacists and pharmacy technicians have made an annual declaration when registering stating their compliance with the Code of Ethics requirement to maintain a CPD record. On 1st March 2009, the Society introduced professional standards and guidance for mandatory CPD. These are designed to meet the Society's obligations under the Pharmacists and Pharmacy Technicians Order 2007. To see the complete *Professional Standards and Guidance for Continuing Professional Development* document, please go to: www.rpsgb.org/pdfs/coepsqcpd.pdf

The most important points of the standards are summarised here. You must:

- **Keep a record of your CPD that is legible.** If you use the online recording system, this is taken care of for you. If you are recording on paper, your handwriting must be clearly formed, in blue or black ink, stay within the boxes provided, be in straight lines, and not be too cramped up or small.
- **Record your CPD in a format published or approved by the Society.** This means either online at www.uptodate.org.uk, or on the paper forms provided in Appendix 2 of this document, or on your employers' approved forms. If these forms are approved by the Society, they will carry this logo:



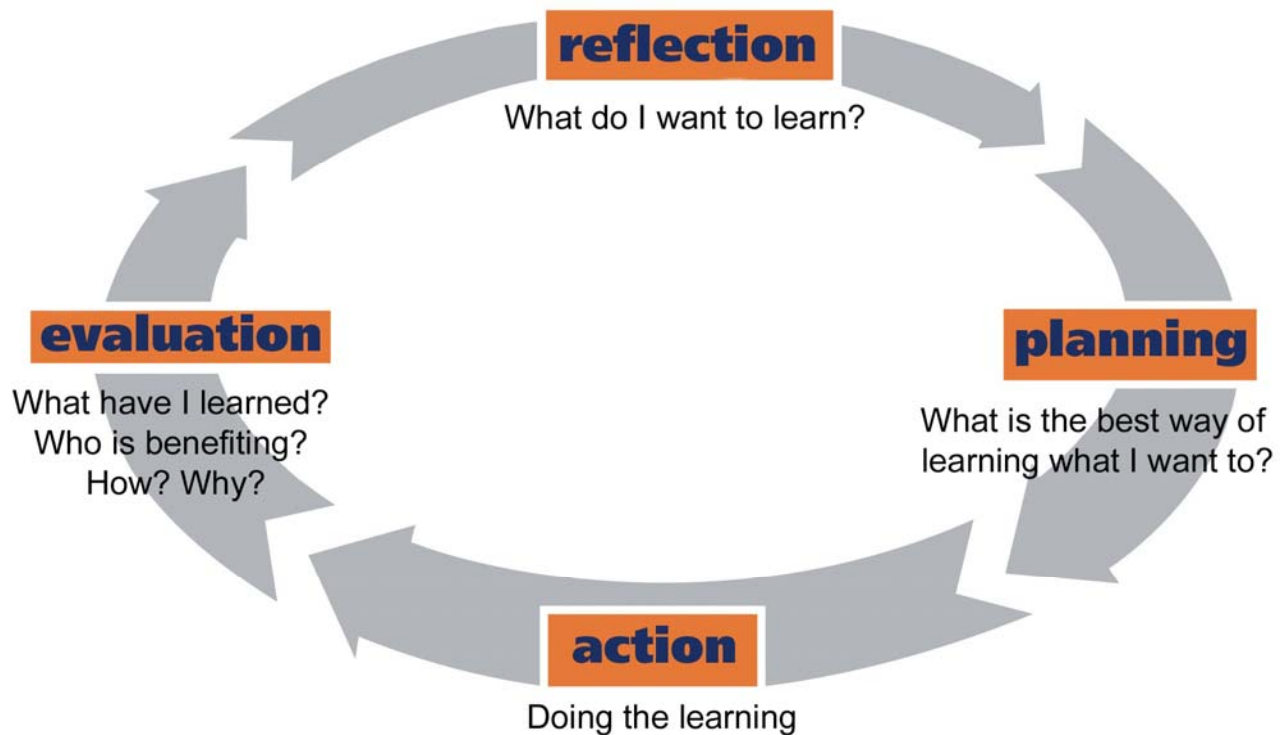
- **Make a minimum of nine CPD entries per year.**
- **Make entries which reflect the context and scope of your practice as a pharmacist or pharmacy technician.** This means that if you spend a lot of time in contact with patients, your CPD entries should be more patient focussed, whereas if you are an academic, there should be a greater emphasis on lectures or papers.
- **Keep a CPD record that complies with the good practice criteria for CPD recording published in Plan and Record by the Society.** The Plan and Record is this document, or the online recording system. You should follow the recommendations in this document closely.
- **Record how your CPD has contributed to the quality or development of your practice using the Society's CPD framework.** Follow the four-point cycle featured in the Society's recording formats.
- **Submit your record to the Society on request.** We will write to you when we want you to submit your record to us. You should not send us anything until we ask you to. We will ask to see your record at least once every five years. The letter will contain specific guidance on how to submit to us. You can view this guidance at www.uptodate.org.uk so that you can be sure your record will comply. You can select which entries you want us to see.

We also recommend that you:

- maintain a learning portfolio with records of attendance
- reflect on your practice and make CPD entries at least once a month
- make some CPD entries which start at the reflection point of the cycle
- ensure that your record is up to date
- take part in and record CPD that results from a range of learning activities

The CPD cycle and how it works

The CPD cycle can be clearly and easily explained by using the diagram below.



You can start your CPD entry at any point in the cycle, but each entry should always end at Evaluation.

If you haven't learnt everything you hoped to in that cycle, you should then start a new entry at Reflection.

Starting at Reflection: you need or want to learn something specific but you don't know how you're going to do it yet

You should start at an entry at Reflection when you identify a gap in your knowledge, skills, and attributes. This can be achieved through self assessment, your own experience (critical incident analysis), your personal development planning process, your appraisal, peer reviews, informal discussions, or other methods. Once you have identified an area for improvement, either alone, with your colleagues or with your employer as part of your CPD cycle, the learning that follows will constitute a CPD entry which starts at Reflection.

Starting at Planning: you want to do a learning activity but you don't have a clear idea of what you want to learn

You can start an entry at planning if you are looking to improve your understanding across a range of issues or areas. For example, you might decide to read the news section of the PJ every week. You are not looking for a specific piece of information or to develop specific new knowledge or skills, you are just looking stay to up to date with what is going on in the profession. In most instances starting at planning will have a very broad scope where you are looking to improve your understanding across a range of issues or areas. Whilst determining an objective as a result of reflection is often the precursor for developing a learning plan, there will be instances where you will have no specific learning objective in mind

Starting at Action: you learnt something useful but you didn't plan how you were going to do it

If you haven't thought about a gap in your learning and planned what you are going to learn, but have learnt something which will contribute to the quality or development of your practice, then you should start the entry at Action and go on to evaluate the impact of your new learning. This type of unplanned learning is opportunist or unscheduled learning.

Starting at Evaluation: you applied something you learnt incidentally, but you do not recall how or why you originally learnt it

As the CPD programme is designed to capture the continuous lifelong learning that constitutes professional life, it is recognised there are occasions that you will apply new knowledge, skills or attitudes that you have learnt incidentally. On these occasions, you may not recall what prompted you to learn the particular ability or knowledge. Or the ability or knowledge may have been gained with the intent of applying it in another area of your life. However you were able to recall and apply it in a relevant professional situation.

As you are at the end point of the learning cycle it is only necessary to record the evaluation of your learning.

If you are still not sure where in the CPD cycle your entry should start, there is a wizard on Plan and Record system at www.uptodate.org.uk. This takes you through a series of questions to identify an appropriate starting point. You can find this wizard by logging in to your record, and starting a new entry

Recording formats – paper or online?

There are a number of ways you can record your CPD.

- The best way is to use the Society's online recording system (CPD Online) at www.uptodate.org.uk.
- There is a desktop version of CPD Online for computer users without internet access, but this is now out of date and we do not recommend using it.
- Alternatively if you do not have access to a computer you can make entries on the paper forms provided in this pack as Appendix 2: Plan and Record Master Record Sheets.
- Some employers have a Society-approved paper format too. If your company forms are approved by the Society, they should display the logo shown below:



Paper recording is perfectly acceptable, but we encourage pharmacists and pharmacy technicians to move to online recording offers as this offers a range of advantages over paper recording.

Why should I record online and what are the advantages?

- Easy editing of your CPD record.
- Legibility – your record is typed, so you needn't worry that your record will be rejected due to illegibility.
- Faster feedback – because your record will get to us faster, our reviewers will be able to offer feedback sooner.
- Easy accessibility – you will be able to access your record from any computer that has internet access.
- You will be able to share specific parts of your CPD record securely and at your discretion over the internet with your employer or colleagues if you wish.
- Safe – your record will be backed up on secure servers, so any problems with your own computer will not affect your record.
- Secure – only you or people you wish to have access can see your record. The Society cannot access any part of your record without your permission, even after you are called for review.
- When you submit your record for review, you will be able to track the progress of your submission online.

If you need a username and password to record online, visit www.uptodate.org.uk
We will send you a letter with a username and password through the post.

If you have simply forgotten your username or password then we can email them to you if you have set this facility up on CPD Online and are able to answer your security question.

Alternatively, you can call our technical helpdesk on 01225 383 663.

Frequently Asked Questions

Basic Requirements: For more information on the mandatory standards for CPD, please see the **Compulsory Standards** section of this document on page 5.

I am registered as a non-practising pharmacist or pharmacy technician. Do I still need to do CPD?

No. Only those on the practising registers need to record CPD, although non-practising individuals are also encouraged to do so.

What will happen when the Society splits into the PLB (Professional Leadership Body) and GPhC (General Pharmaceutical Council)?

When the Society demerges to form the new professional body and the GPhC, existing CPD records will continue to be available to those registered with the GPhC so that they can access them for their own development needs and are able to select entries to submit to the regulator upon request. Relevant steps will be taken to ensure that individual records are preserved and remain available after the transitional phase.

When will I need to submit my CPD record to the Society?

Only when the Society asks. We will send you a letter of notification with all the guidance you will need to submit your record and you will have up to six weeks to do this.

What will I need to submit?

The Society will tell you exactly what you need to submit when we ask for your record. You can find a copy of the guidance sheets at www.uptodate.org.uk, under 'CPD Materials', if you want more information on the subject. You will only have to submit evidence of your learning if we ask for it (see below).

How often will my record be called for review?

At least once every five years.

Do I need to collect evidence?

Good practice guidance states "you should maintain a learning portfolio with records of attendance and key learning points from continuing education and notes of other learning e.g. through work." We will not ask you to submit supporting documentation, but we will be auditing a small number of records in the future in order to check for fraudulent records. You should retain attendance certificates and paperwork from any appraisals or audits that have fed into your CPD in your learning portfolio.

What about entries I made before March 2009?

These entries will not be required to meet the CPD standards but would be expected to relate to previous guidance on keeping a legible CPD record in a Society approved format.

What if my CPD record gets called in after 1st March 2010?

As the standards will have been in force for one year by March 2010 you will be expected to demonstrate that you have made a minimum of nine entries between 1st March 2009 and 1st March 2010. These entries must comply with the CPD Standards. The CPD Good Practice Guidance states that you should aim to complete more than the minimum number of CPD entries each year.

There will be gaps in my record because I was ill/on maternity leave. What should I do?

If you were on maternity leave or seriously ill, you are exempt from making CPD entries during that period as long as you can prove to us that this was the case and the period was twelve months or less. When your record is called for review, you should write to us or email us to explain that this was the case. We will then issue you with the appropriate documentation which you will need to return to us with relevant evidence (for example, a doctor's letter).

How will my CPD record be reviewed?

Your CPD record will be reviewed against a standard set of criteria. These criteria are consistent with those published as part of the Society's Plan and Record document and can be found in [appendix 5 of this document](#).

Who will review my CPD record?

Your CPD record will be examined by trained CPD reviewers who are contracted by the Society. CPD reviewers come from a range of backgrounds and include pharmacists, pharmacy technicians, and others. They have all been through an extensive selection, assessment, and training process and are subject to ongoing quality assessment during their contracted employment by the Society. At various stages it is expected that there will be a requirement for more reviewers to be employed. These positions will be advertised on the RSPGB website and through the *Pharmaceutical Journal*.

When my record is called for review, will I get feedback?

Yes. Once your CPD record has been reviewed, you will receive feedback on the good practice that has been identified within your CPD record as well as aspects of your CPD that you may need to look at again.

What happens if I do not comply with the CPD standards?

Under the Code of Ethics you must comply with the CPD Standards which came into effect on 1st March 2009. For more information on these standards, please see page 5 of this document. If you refuse to submit your record to the Society upon request and accept the allegation of non-compliance, you will be sent a letter from the Chief Inspector and this will be made a note of in your Society record. This note will remain in your record for five years. If you do not accept the allegation, or you do not accept the advice in the letter from the Chief Inspector, or you request that your case to be referred, you will be referred to the Investigating Committee.

Support and useful contacts

For additional guidance material, case studies, and online tutorials, please go to www.uptodate.org.uk, where you can also record your CPD online.

For more help and information, you can also visit:

- The Professional Leadership Body's website at www.pharmacyplb.com
- PJ Online, where CPD articles are available on the web, at www.pjonline.com
- The Royal Pharmaceutical Society's website at www.rpsgb.org

RPSGB CPD team

Telephone: 020 7572 2540

Email: cpd@rpsgb.org

CPD technical helpdesk (CPD Online and CPD Desktop)

Telephone: 01225 383 663

Email: helpdesk@coacs.com

CPPE (Centre for Pharmacy Postgraduate Education)

Telephone: 0161 778 4000

Website: www.cppe.manchester.ac.uk

Email: info@cppe.ac.uk

NES (NHS Education Scotland)

Telephone: 0141 223 1400

Email: pharmacy@nes.scot.nhs.uk

WCPPE (Welsh Centre for Pharmacy Postgraduate Education)

Telephone: 02920 874784

Email: WelshCPPE@cardiff.ac.uk

APTUK (Association of Pharmacy Technicians UK)

The professional body for Pharmacy Technicians

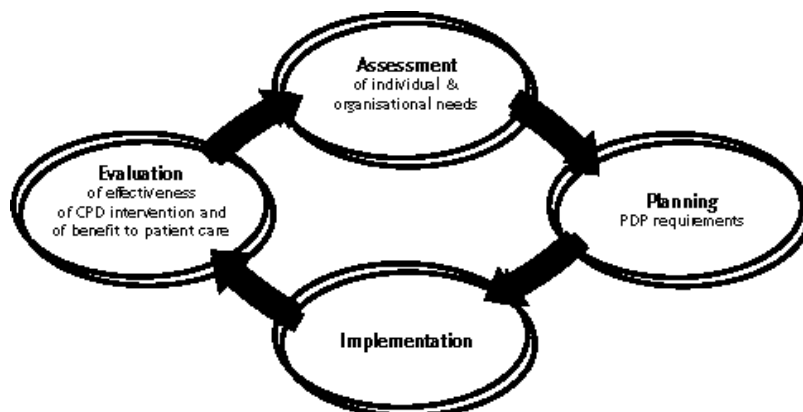
Telephone: 020 7551 1551

Website: www.aptuk.org

Appendix 1

Clinical governance in the NHS

Clinical governance is about both continuous quality improvement and being accountable for quality improvement. As such, CPD is an integral part of clinical governance and it affects all health professionals working in the NHS. The Department of Health's publication *A First Class Service: Quality in the NHS* outlines some important principles for CPD. *A First Class Service* relates to England, but the same principles and approaches apply in the other countries of the British Isles. The Society's CPD cycle closely resembles the model of CPD described in *A First Class Service*, and this DoH's model is illustrated below:



In relation to CPD, *A First Class Service* states that:

“Continuing Professional Development (CPD) programmes need to meet both the learning needs of individual health professionals to inspire public confidence in their skills, but importantly they also need to meet the wider service development needs of the NHS.”

The importance of relating your individual learning or development needs to those of the NHS is also emphasised by the Department of Health. It states:

- “CPD programmes are best managed locally to meet both local service needs and those of individual professionals.”
- “We support the identification of professional and service needs... developed by individual health professionals in discussion and agreement with colleagues locally.”

Particular emphasis is placed by the Department of Health on “supporting audit of practice and relating it to learning needs”. *A First Class Service* makes it clear that CPD is not just about courses, stating:

“A Personal Development Plan should take account of different learning preferences (such as peer group or individual learning), clearly identify where team or multi-professional learning offers the best solution, and take full advantage of opportunities for learning on the job. CPD does not necessarily mean going on courses.”

The Society's CPD model is consistent with this: we believe that it is pharmacists and pharmacy technicians who should drive the process of identifying learning needs, involving other health professionals locally through processes such as critical incident analysis, peer review and performance appraisal. We also believe that each pharmacist or pharmacy technician has a variety of methods of learning, and that as long as this learning improves their practise, then it is valuable, whether that is through work shadowing, meetings, tutoring, or simply doing some structured reading and research.

Appendix 2

Master record sheets

This section, Appendix 2, contains the Plan and Record Master Record Sheets. If you are choosing to record your nine CPD entries per year on paper, you must record it either on these, or on another Society approved paper format. These alternative approved formats may well be supplied by your employer, and if they are approved by RPSGB, should carry this logo:



When you are completing these sheets, you should make sure you complete a full section, and do not mix-and-match sheets. This means that if you wish to start an entry at **Reflection**, you should complete all four sheets which have 'For learning that starts at Reflection' at the very top. Equally, if you start at **Action**, you should complete the two sheets with 'For learning that starts at Action' written at the top.

These forms are master copies – you should photocopy them to make your entries on, but they are also available for download at www.uptodate.org.uk.

Don't forget, if you are recording on paper, you should make sure that you are conforming to the standards on page 5, and your writing should be legible and in blue or black ink.

**Plan and Record Appendix 2
Master record sheets for pharmacists
and pharmacy technicians**



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The record sheets included here are master copies. Please photocopy. Do not write on these master copies – replacements will not be provided.

For learning that starts at Reflection

Date learning need identified ___ / ___ / 20 ___

CPD no. ___

Name of entry _____

Entry no. ___

Reflection

R1: What do you want to learn?

What you need to learn may be new knowledge, skill(s), or a new attitude – anything which will help you to change your practice for the better. You should make it as specific as possible.

R2: How did you identify what you needed to learn?

Explain how you chose what to learn. You should include why this bit of learning is relevant to you and to your practice as a pharmacist or pharmacy technician.

R3: Tick one or more methods that you used to identify what you needed to learn.

- | | |
|--|--|
| <input type="checkbox"/> Critical incidents | <input type="checkbox"/> Audit |
| <input type="checkbox"/> Appraisal | <input type="checkbox"/> Feedback from users of service / products |
| <input type="checkbox"/> Peer review/talking to colleagues | <input type="checkbox"/> Reading |
| <input type="checkbox"/> Personal interest | <input type="checkbox"/> Other |

R4: To which competences does this learning objective relate? (optional)

(Optional field – if you do not feel competences are relevant to you, please do not enter them)

Competence code	Competence description

Planning

P1: When will you need to have achieved this learning? ___ ___ / ___ ___ / 20 ___ ___

Putting an estimated date may help you to set priorities for your learning. Be as specific as possible, but don't worry if the date is just an approximation.

P2: Why is this learning important to you and your practice?

Write a brief description of how this learning will affect you, your service users, your colleagues and your organisation. If you don't think that your learning will have a significant impact on anyone, you might want to consider why you are undertaking and recording this learning.

You can use the scale below to rate the importance of this learning, but you also need to fill in the box above too.

	None	Low	Moderate	High	Very high
Importance to you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to the users of your services or products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P3: What might you need to do in order to achieve this learning?

It is important for you to consider a range of options for achieving your learning. Aim to list a few different options e.g. attend workshops, study open learning packs, talk to colleagues. Outline what you think are the advantages and disadvantages of each option. You may not choose to complete all the options that you've listed, but it is important to show that you have considered them.

Option	Description of what you plan to do	Advantages	Disadvantages	Select (✓ or ✗)
1				
2				
3				

4				
5				

Action

A1: When did you complete the activities outlined in your plan?

Record the date you completed the activities that you chose from your plan. If you need to keep a continuing education record for other organisations then you may find it useful to jot down how long each activity took, but this is not an RPSGB requirement. The number in the option column should correspond to the options you selected in the question above (P3).

Option	Description of what you did	Date completed

A2: What have you learnt?

Describe what specific skill, knowledge, attitudes and/or behaviours you've gained as a result of your learning. This may be different to what you originally set out to learn.

Evaluation

E1: To what extent did you learn what you set out to learn at the start of this CPD cycle?

You may find it useful to revisit the 'Reflection' page and decide on what you originally wanted to learn before you decide to what extent you've achieved that learning.

Fully

Partly

Not at all

E2: If you ticked 'fully' or 'partly', give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had

E3: If you ticked 'fully' or 'partly', what have been the benefits to your practice?

You might find it useful to revisit your 'Planning' page and consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

E4: If you ticked 'partly' or 'not at all', describe what it is you still have to learn.

You may find it useful to revisit the 'Reflection' page and check on what it is you originally wanted to learn before you describe what it is you still need to learn.

E5: If you ticked 'partly' or 'not at all', explain why you think you didn't achieve your learning.

You may find it useful to revisit the 'Reflection' and 'Planning' pages to work out why you didn't achieve everything you set out to learn. It's all right for you not to have achieved all of your learning, but it is important that you explain why.

E6: If you ticked 'partly' or 'not at all', what do you intend to do next?

Nothing, I've learnt enough for what I need

Review this entry to see how I can achieve the outstanding learning

Start a new CPD cycle at Reflection about what I still need to learn

**Plan and Record Appendix 2
Master record sheets for pharmacists
and pharmacy technicians**



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of Great Britain

The record sheets included here are master copies. Please photocopy. Do not write on these master copies – replacements will not be provided.

For learning that starts at Planning

Date learning need identified ___ / ___ / 20 ___

CPD no. ___ ___ ___

Name of entry _____ Entry no. ___ ___

Planning

P1: Describe the learning activity that you are planning to do

This can be any activity that helps you to learn and can be formal (e.g. a course), or informal (e.g. talking to colleagues).

P2: What do you hope to learn from this activity?

Write a simple statement of what you hope to learn.

P3: What are the advantages and disadvantages of this activity?

When describing the advantages and disadvantages, you'll be showing that you've given some thought to the activity and you feel that is achievable and relevant.

Advantages	Disadvantages

P4: Action category (optional)

- | | | | |
|--|---|--|-------------------------------------|
| <input type="checkbox"/> Brainstorming | <input type="checkbox"/> Colleagues | <input type="checkbox"/> Computer Aided Learning | <input type="checkbox"/> Workshops |
| <input type="checkbox"/> Distance Learning | <input type="checkbox"/> Friends | <input type="checkbox"/> Information Service | <input type="checkbox"/> Meetings |
| <input type="checkbox"/> Mentoring | <input type="checkbox"/> Presentations | <input type="checkbox"/> Projects | <input type="checkbox"/> Secondment |
| <input type="checkbox"/> Short Course | <input type="checkbox"/> Symposium | <input type="checkbox"/> Structured Reading | <input type="checkbox"/> Teaching |
| <input type="checkbox"/> Tutoring | <input type="checkbox"/> Work shadowing | <input type="checkbox"/> Postgraduate Certificate/Diploma/Degree | |

P5: What is driving this? (optional)

- NHS or employing organisation
 Patients or service users
 Colleagues or peers
 Personal interest

P6: To what areas of competence does this learning objective relate? (optional)

Competence code	Competence description

P7: When do you see yourself completing this learning activity?

___ / ___ / 20 ___

P8: Why is this learning important to you and your practice?

Write a brief description of how this learning will affect you, your service users, your colleagues and your organisation. If you don't think that your learning will have a significant impact on anyone, you may want to consider why you are undertaking and recording this learning.

You can use the scale below to rate the importance of this learning, but you also need to fill in the box above too.

	None	Low	Moderate	High	Very high
Importance to you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to the users of your services or products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Action

Date action completed ___ / ___ / 20 ___

A1: What have you learnt?

Describe what specific skill, knowledge, attitudes and/or behaviours you've gained as a result of your learning. This may be different to what you originally set out to learn.

Evaluation

E1: Have you gained what you hoped from this learning activity?

Fully

Partly

Not at all

E2: If you ticked 'fully' or 'partly', give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had a chance to put your learning into practice. It's not enough just to write about what you intend to do.

E3: If you ticked 'fully' or 'partly', what have been the benefits to your practice?

You might find it useful to revisit your 'Planning' page and consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

E4: If you ticked 'partly' or 'not at all, describe what it is you still have to learn.

If you did not learn everything you wanted to, what is it that you still have to learn?

E5: If you ticked 'partly' or 'not at all', explain why you think you didn't achieve your learning.

If you did not learn everything you wanted to, why did this happen? It's alright for you not to have achieved all your learning, but it is important that you explain why.

E6: If you ticked 'partly' or 'not at all', what do you intend to do next?

Nothing, I've learnt enough for what I need

Review this entry to see how I can achieve the outstanding learning

Start a new CPD cycle at Reflection about what I still need to learn

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The record sheets included here are master copies. Please photocopy. Do not write on these master copies – replacements will not be provided.

For learning that starts at Action

Date learning need identified ___ / ___ / 20 ___	CPD no. _____
Name of entry _____	Entry no. ___

Action

A1: Describe the activity you undertook that enabled you to learn something new.

Be specific about the activity you describe. If you read an article, give it a reference.

A2: Action category (optional)

- | | | | |
|---|---------------------------------------|---|---|
| <input type="checkbox"/> Brainstorming | <input type="checkbox"/> Colleagues | <input type="checkbox"/> Computer Aided Learning | <input type="checkbox"/> Workshops |
| <input type="checkbox"/> Distance Learning | <input type="checkbox"/> Friends | <input type="checkbox"/> Information Service | <input type="checkbox"/> Meetings |
| <input type="checkbox"/> Mentoring | <input type="checkbox"/> Postgraduate | <input type="checkbox"/> Certificate/Diploma/Degree | <input type="checkbox"/> Presentations |
| <input type="checkbox"/> Projects | <input type="checkbox"/> Secondment | <input type="checkbox"/> Short Course | <input type="checkbox"/> Symposium |
| <input type="checkbox"/> Structured Reading | <input type="checkbox"/> Teaching | <input type="checkbox"/> Tutoring | <input type="checkbox"/> Work shadowing |

A3: To what areas of competence does this learning objective relate? (optional)

Competence code	Competence description

A4: Describe what you actually learnt from this activity.

Try to describe this in terms of the skills, knowledge, attitudes and/or behaviours you have developed.

Evaluation

E1: Give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had a chance to put your learning into practice. It's not enough just to write about what you intend to do.

E2: How has what you learnt actually benefited your practice?

You might find it useful to consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

E3: What do you intend to do next?

Nothing, I've learnt enough for what I need

Start a new CPD cycle at Reflection about what I still need to learn

**Plan and Record Appendix 2
Master record sheets for pharmacists
and pharmacy technicians**



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For learning that starts at Evaluation

Date learning need identified ___ / ___ / 20 ___

CPD no. ___ - ___ - ___ - ___

Name of entry _____

Entry no. ___ - ___

Evaluation

E1: Describe a situation where you've applied something that you've learnt to your practice.

These are situations where you feel that you've done well in applying something that you've learned. Remember that this may be the application of a skill, using your knowledge, or describing where a change in attitude has helped you to be more effective.

E2: Describe how your practice benefited from applying what you learnt.

You might find it useful to consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

E3: What do you intend to do next?

Nothing, I've learnt enough for what I need

Start a new CPD cycle at Reflection about what I still need to learn

Appendix 3

Exemplar record sheets

In this section, you will find five exemplar record sheets. Three are examples for pharmacists, and two are examples for pharmacy technicians, but it is worth reading through all five to gain an insight into the sorts of things you can use to make a CPD entry about.

These entries all start at either **Reflection** or **Action** as these are the most common starting points, but remember, if it is more appropriate, you can also start at **Planning** or **Evaluation**, too. For more help on which point in the cycle you should start at, you should go to the Plan and Record Overview and find the section entitled *The CPD cycle and how it works*, which is on page 6.

Plan and Record Appendix 3 Exemplar record sheets



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For learning that starts at Reflection

Date learning need identified 17 / 06 / 20 09

CPD no. _ _ _ _ _

Name of entry Herbal Medicines

Entry no. _ _

Reflection

EXAMPLE FOR PHARMACISTS

R1: What do you want to learn?

What you need to learn may be new knowledge, skill(s), or a new attitude – anything which will help you to change your practice for the better. You should make it as specific as possible.

Advise patients regarding the actions and uses of herbal medicines in clinical practice. In particular, how these medicines interact with conventional therapies. To find a scientific basis (if not evidence) for the advice I give.

R2: How did you identify what you needed to learn?

Explain how you chose what to learn. You should include why this bit of learning is relevant to you and to your practice as a pharmacist or pharmacy technician.

More and more patients are demanding herbal remedies.

R3: Tick one or more methods that you used to identify what you needed to learn.

- | | |
|---|--|
| <input checked="" type="checkbox"/> Critical incidents | <input type="checkbox"/> Audit |
| <input type="checkbox"/> Appraisal | <input type="checkbox"/> Feedback from users of service/products |
| <input checked="" type="checkbox"/> Peer review/talking to colleagues | <input type="checkbox"/> Reading |
| <input type="checkbox"/> Personal interest | <input type="checkbox"/> Other |

R4: To which competencies does this learning objective relate? (optional)

(Optional field – if you do not feel competencies are relevant to you, please do not enter them)

Competence code	Competence description
G1a	
G1f	

Planning

P1: When will you need to have achieved this learning? 08 / 07 / 20 09

Putting an estimated date may help you to set priorities for your learning. Be as specific as possible, but don't worry if the date is just an approximation.

P2: Why is this learning important to you and your practice?

Write a brief description of how this learning will affect you, your service users, your colleagues and your organisation. If you don't think that your learning will have a significant impact on anyone, you might want to consider why you are undertaking and recording this learning.

Its importance to me will be modest in that my general knowledge in this area will be improved and satisfy an interest. Users will benefit greatly from being informed as to what medicines and herbs cannot be taken at the same time. Colleagues will benefit from shared information.

You can use the scale below to rate the importance of this learning, but you also need to fill in the box above too.

	None	Low	Moderate	High	Very high
Importance to you	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to the users of your services or products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Importance to colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to organisation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P3: What might you need to do in order to achieve this learning?

It is important for you to consider a range of options for achieving your learning. Aim to list a few different options e.g. attend workshops, study open learning packs, talk to colleagues. Outline what you think are the advantages and disadvantages of each option. You may not choose to complete all the options that you've listed, but it is important to show that you have considered them.

Option	Description of what you plan to do	Advantages	Disadvantages	Select (✓ or ✗)
1	<i>Attend CPPE Local Session 3.</i>	<i>Interactive - learning with others can be motivating.</i>	<i>May not give me enough information on specific products.</i>	✓
2	<i>Course of lectures at local school of pharmacy.</i>	<i>Scientific focus.</i>	<i>Too much chemistry. I don't like being lectured to.</i>	✗
3	<i>Information search - books in hand.</i>	<i>Quick and easy to use.</i>	<i>Deciding what is a reliable and accurate source of information.</i>	✓

4				
5				

Action

A1: When did you complete the activities outlined in your plan?

Record the date you completed the activities that you chose from your plan. If you need to keep a continuing education record for other organisations then you may find it useful to jot down how long each activity took, but this is not an RPSGB requirement. The number in the option column should correspond to the options you selected in the question above (P3).

Option	Description of what you did	Date completed
1	<i>CPPE Local Session.</i>	<i>03/07/2009</i>
3	<i>Information search - books in hand.</i>	<i>07/07/2009</i>

A2: What have you learnt?

Describe what specific skill, knowledge, attitudes and/or behaviours you've gained as a result of your learning. This may be different to what you originally set out to learn.

*CPPE gave some useful references for articles and books on herbal medicines.
Found that I can apply existing skills in critical analysis to publications on herbal medicines.*

Evaluation

E1: To what extent did you learn what you set out to learn at the start of this CPD cycle?

You may find it useful to revisit the 'Reflection' page and decide on what you originally wanted to learn before you decide to what extent you've achieved that learning.

Fully

Partly

Not at all

E2: If you ticked ‘fully’ or ‘partly’, give an example of how you’ve applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you’ve actually learnt what you set out to. It may be a while before you apply what you have learnt. It’s fine to leave this box blank and come back to it when you’ve had

A customer asked if he could take a herbal supplement that he’d seen advertised on the internet while he was taking bupropion. I was able to check whether any of the herbal ingredients were likely to be affected (bupropion is a liver enzyme inducer) and whether any were likely to lower seizure threshold (a potentially serious interaction).

E3: If you ticked ‘fully’ or ‘partly’, what have been the benefits to your practice?

You might find it useful to revisit your ‘Planning’ page and consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you’ve had from other people.

A customer was pleased that she had asked my advice on St John’s Wort. She had asked me whether it was any good. I automatically checked my PMR and noticed that she took combined oral contraception. I knew from my lectures that the efficacy of her oral contraception could be reduced by St John’s Wort.

E4: If you ticked ‘partly’ or ‘not at all’, describe what it is you still have to learn.

You may find it useful to revisit the ‘Reflection’ page and check on what it is you originally wanted to learn before you describe what it is you still need to learn.

E5: If you ticked ‘partly’ or ‘not at all’, explain why you think you didn’t achieve your learning.

You may find it useful to revisit the ‘Reflection’ and ‘Planning’ pages to work out why you didn’t achieve everything you set out to learn. It’s all right for you not to have achieved all of your learning, but it is important that you explain why.

E6: If you ticked ‘partly’ or ‘not at all’, what do you intend to do next?

- Nothing, I’ve learnt enough for what I need
- Review this entry to see how I can achieve the outstanding learning
- Start a new CPD cycle at Reflection about what I still need to learn

Plan and Record Appendix 3 Exemplar Record Sheets



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For learning that starts at Reflection

Date learning need identified *02 / 04 / 20 09*

CPD no. _ _ _ _ _

Orlistat 60mg capsules becoming available over the counter

Name of entry _____

Entry no. _ _

Reflection

EXAMPLE FOR PHARMACISTS

R1: What do you want to learn?

What you need to learn may be new knowledge, skill(s), or a new attitude – anything which will help you to change your practice for the better. You should make it as specific as possible.

I want to learn what the criteria are to sell Orlistat 60 mg over the counter; how it works and what the side effects are so that I can sell this drug appropriately over the counter and to be able to answer any questions the customers have.

R2: How did you identify what you needed to learn?

Explain how you chose what to learn. You should include why this bit of learning is relevant to you and to your practice as a pharmacist or pharmacy technician.

This has been identified because of interest in the media at present and is a very topical issue. I expect an increase in requests for this drug.

R3: Tick one or more methods that you used to identify what you needed to learn.

- | | |
|---|---|
| <input type="checkbox"/> Critical incidents | <input type="checkbox"/> Audit |
| <input type="checkbox"/> Appraisal | <input checked="" type="checkbox"/> Feedback from users of service / products |
| <input checked="" type="checkbox"/> Peer review/talking to colleagues | <input checked="" type="checkbox"/> Reading |
| <input checked="" type="checkbox"/> Personal interest | <input type="checkbox"/> Other |

R4: To which competencies does this learning objective relate? (optional)

(Optional field – if you do not feel competencies are relevant to you, please do not enter them)

Competence code	Competence description

Planning

P1: When will you need to have achieved this learning? 03 / 04 / 20 09

Putting an estimated date may help you to set priorities for your learning. Be as specific as possible, but don't worry if the date is just an approximation.

P2: Why is this learning important to you and your practice?

Write a brief description of how this learning will affect you, your service users, your colleagues and your organisation. If you don't think that your learning will have a significant impact on anyone, you might want to consider why you are undertaking and recording this learning.

When there is a POM to P switch it is vital that I equip myself with the required knowledge and skills. This is a very topical issue at the moment and needs a knowledgeable response to patients' questions. If I cannot demonstrate a firm understanding of the issues involved, I may well lose some customer confidence.

You can use the scale below to rate the importance of this learning, but you also need to fill in the box above too.

	None	Low	Moderate	High	Very high
Importance to you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Importance to the users of your services or products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Importance to colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Importance to organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

P3: What might you need to do in order to achieve this learning?

It is important for you to consider a range of options for achieving your learning. Aim to list a few different options e.g. attend workshops, study open learning packs, talk to colleagues. Outline what you think are the advantages and disadvantages of each option. You may not choose to complete all the options that you've listed, but it is important to show that you have considered them.

Option	Description of what you plan to do	Advantages	Disadvantages	Select (✓ or ✗)
1	<i>Read the RPSGB practice guidance.</i>	<i>Evidence-based and objective.</i>	<i>Only top line information - for detail need to access specific references.</i>	✓
2	<i>Read company specific training pack.</i>	<i>Quick, convenient and has practical information like how to check BMI.</i>	<i>May need to be revised if new information is received.</i>	✓
3	<i>Speak to a colleagues & share good practice.</i>	<i>Quick and convenient and good to talk to someone.</i>	<i>Will get a personal view: is it evidence based?</i>	✓

4	<i>Access relevant websites about management of obesity</i>	<i>Gives a good background knowledge</i>	<i>Choice of websites have to be assessed for reliability and validity of information</i>	*
5				

Action

A1: When did you complete the activities outlined in your plan?

Record the date you completed the activities that you chose from your plan. If you need to keep a continuing education record for other organisations then you may find it useful to jot down how long each activity took, but this is not an RPSGB requirement. The number in the option column should correspond to the options you selected in the question above (P3).

Option	Description of what you did	Date completed
1	<i>Read the RPSGB practice guidance.</i>	<i>05/04/2009</i>
2	<i>Read company specific training pack.</i>	<i>04/04/2009</i>
3	<i>Speak to a colleagues & share good practice.</i>	<i>10/04/2009</i>

A2: What have you learnt?

Describe what specific skill, knowledge, attitudes and/or behaviours you've gained as a result of your learning. This may be different to what you originally set out to learn.

I am now confident that I have adequate knowledge about Orlistat, how it works, how to take it, adverse effects and its drug interactions.

Evaluation

E1: To what extent did you learn what you set out to learn at the start of this CPD cycle?

You may find it useful to revisit the 'Reflection' page and decide on what you originally wanted to learn before you decide to what extent you've achieved that learning.

Fully

Partly

Not at all

E2: If you ticked 'fully' or 'partly', give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had

A customer asked for advice about Alli. I was able to present her with the evidenced information. We had a good discussion and we agreed that Alli was not appropriate for this customer and I referred her for a chat with the GP.

E3: If you ticked 'fully' or 'partly', what have been the benefits to your practice?

You might find it useful to revisit your 'Planning' page and consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

Had another query from a customer who was very worried and I was able to reassure this person with confidence.

E4: If you ticked 'partly' or 'not at all', describe what it is you still have to learn.

You may find it useful to revisit the 'Reflection' page and check on what it is you originally wanted to learn before you describe what it is you still need to learn.

I am better informed now but will spend some time looking for more information using relevant websites.

E5: If you ticked 'partly' or 'not at all', explain why you think you didn't achieve your learning.

You may find it useful to revisit the 'Reflection' and 'Planning' pages to work out why you didn't achieve everything you set out to learn. It's all right for you not to have achieved all of your learning, but it is important that you explain why.

This drug was released very quickly and I had to equip myself with baseline knowledge to deal with requests. I didn't have time to go into this in more depth.

E6: If you ticked 'partly' or 'not at all', what do you intend to do next?

Nothing, I've learnt enough for what I need

Review this entry to see how I can achieve the outstanding learning

Start a new CPD cycle at Reflection about what I still need to learn

**Plan and Record Appendix 3
Exemplar Record Sheets**



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For learning that starts at Action

Date learning need identified 03 / 03 / 20 09	CPD no. _____
Name of entry _____ <i>COPD</i>	Entry no. ____

Action EXAMPLE FOR PHARMACISTS

A1: Describe the activity you undertook that enabled you to learn something new.

Be specific about the activity you describe. If you read an article, give it a reference.

Read PJ online 2008; 280:662.

A2: Action category (optional)

- | | | | |
|--|---------------------------------------|---|---|
| <input type="checkbox"/> Brainstorming | <input type="checkbox"/> Colleagues | <input type="checkbox"/> Computer Aided Learning | <input type="checkbox"/> Workshops |
| <input type="checkbox"/> Distance Learning | <input type="checkbox"/> Friends | <input type="checkbox"/> Information Service | <input type="checkbox"/> Meetings |
| <input type="checkbox"/> Mentoring | <input type="checkbox"/> Postgraduate | <input type="checkbox"/> Certificate/Diploma/Degree | <input type="checkbox"/> Presentations |
| <input type="checkbox"/> Projects | <input type="checkbox"/> Secondment | <input type="checkbox"/> Short Course | <input type="checkbox"/> Symposium |
| <input checked="" type="checkbox"/> Structured Reading | <input type="checkbox"/> Teaching | <input type="checkbox"/> Tutoring | <input type="checkbox"/> Work shadowing |

A3: To what areas of competence does this learning objective relate? (optional)

Competence code	Competence description

A4: Describe what you actually learnt from this activity.

Try to describe this in terms of the skills, knowledge, attitudes and/or behaviours you have developed.

Information about counselling points relating to warfarin administration and its interactions with drugs, specific foods and food supplements.

Evaluation

E1: Give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had a chance to put your learning into practice. It's not enough just to write about what you intend to do.

I was doing an MUR with a patient who was on warfarin therapy and I was able to take a more structured approach to conducting the MUR. I was able to focus on the key points.

E2: How has what you learnt actually benefited your practice?

You might find it useful to consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

Patients have commented that they were not aware that warfarin interacted with Cranberry Juice and have appreciated my timely advice.

E3: What do you intend to do next?

Nothing, I've learnt enough for what I need

Start a new CPD cycle at Reflection about what I still need to learn

Plan and Record Appendix 3 Exemplar Record Sheets



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For learning that starts at Reflection

Date learning need identified 23 / 04 / 20 09

CPD no. _ _ _ _ _

Name of entry Audit

Entry no. _ _

Reflection

EXAMPLE FOR PHARM. TECHS

R1: What do you want to learn?

What you need to learn may be new knowledge, skill(s), or a new attitude – anything which will help you to change your practice for the better. You should make it as specific as possible.

I want to learn how to carry out an audit. I want to be able to understand different methods of performing audits and how to use them.

R2: How did you identify what you needed to learn?

Explain how you chose what to learn. You should include why this bit of learning is relevant to you and to your practice as a pharmacist or pharmacy technician.

I want to conduct an audit to find out the reason for the recent increase in prescription waiting times.

R3: Tick one or more methods that you used to identify what you needed to learn.

- | | |
|---|---|
| <input checked="" type="checkbox"/> Critical incidents | <input type="checkbox"/> Audit |
| <input type="checkbox"/> Appraisal | <input checked="" type="checkbox"/> Feedback from users of service / products |
| <input checked="" type="checkbox"/> Peer review/talking to colleagues | <input type="checkbox"/> Reading |
| <input type="checkbox"/> Personal interest | <input type="checkbox"/> Other |
| <input type="checkbox"/> | |

R4: To which competencies does this learning objective relate? (optional)

(Optional field – if you do not feel competencies are relevant to you, please do not enter them)

Competence code	Competence description
TG3	<i>Managing a team or service</i>
TG12	<i>Undertaking specialised activities, e.g. provision of education</i>
THP5	<i>Reviewing and developing services</i>

Planning

P1: When will you need to have achieved this learning?

13 / 05 / 20 09

Putting an estimated date may help you to set priorities for your learning. Be as specific as possible, but don't worry if the date is just an approximation.

P2: Why is this learning important to you and your practice?

Write a brief description of how this learning will affect you, your service users, your colleagues and your organisation. If you don't think that your learning will have a significant impact on anyone, you might want to consider why you are undertaking and recording this learning.

It is important because I need to identify what's causing an increase in prescription waiting times and work out ways of reducing them. Patients will have shorter waits. Staff will be happier and less stressed. Managers will see we are meeting departmental standards. The organisation will be seen to be providing a more efficient service.

You can use the scale below to rate the importance of this learning, but you also need to fill in the box above too.

	None	Low	Moderate	High	Very high
Importance to you	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to the users of your services or products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Importance to colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance to organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

P3: What might you need to do in order to achieve this learning?

It is important for you to consider a range of options for achieving your learning. Aim to list a few different options e.g. attend workshops, study open learning packs, talk to colleagues. Outline what you think are the advantages and disadvantages of each option. You may not choose to complete all the options that you've listed, but it is important to show that you have considered them.

Option	Description of what you plan to do	Advantages	Disadvantages	Select (✓ or ✗)
1	<i>Talk to peers and colleagues.</i>	<i>May be able to recommend an approach that they have found successful.</i>	<i>May give biased view and advise an approach that may not be the best one.</i>	<input checked="" type="checkbox"/>
2	<i>Research audit on RPSGB website.</i>	<i>Immediately available.</i>	<i>May take time to decide on best method.</i>	<input checked="" type="checkbox"/>
3	<i>Attend a training course on audit.</i>	<i>Will be able to offer lots of support and ideas on how to start.</i>	<i>May not be a course running soon enough.</i>	<input checked="" type="checkbox"/>

4				
5				

Action

A1: When did you complete the activities outlined in your plan?

Record the date you completed the activities that you chose from your plan. If you need to keep a continuing education record for other organisations then you may find it useful to jot down how long each activity took, but this is not an RPSGB requirement. The number in the option column should correspond to the options you selected in the question above (P3).

Option	Description of what you did	Date completed
2	<i>Research audit on RPSGB website.</i>	<i>29/04/2009</i>
3	<i>Attend training course on audit.</i>	<i>10/05/2009</i>

A2: What have you learnt?

Describe what specific skill, knowledge, attitudes and/or behaviours you've gained as a result of your learning. This may be different to what you originally set out to learn.

I have learnt how to perform an audit and analyse the results. I understand the stages of the audit cycle: how to identify the problem, set standards (e.g. for my audit what is an acceptable time for patients to wait for their prescriptions), collect data, analyse data against the standards, agree plan of action, make changes & educate, repeat the audit. The RPSGB have a series of ready to use audit tools including a number of audits that can be carried out in the dispensary.

Evaluation

E1: To what extent did you learn what you set out to learn at the start of this CPD cycle?

You may find it useful to revisit the 'Reflection' page and decide on what you originally wanted to learn before you decide to what extent you've achieved that learning.

Fully

Partly

Not at all

E2: If you ticked 'fully' or 'partly', give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had

I have conducted a two week audit and identified the main factors for the increase in prescription waiting times.

E3: If you ticked 'fully' or 'partly', what have been the benefits to your practice?

You might find it useful to revisit your 'Planning' page and consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

My line manager is pleased that I have undertaken the audit. He can use the results to demonstrate that employing a receptionist to deal with all the incoming queries would enable the dispensary staff to get on with their dispensing. This saves recruiting an additional qualified pharmacy technician. The staff are pleased that their work will be less stressful and have agreed to take turns as acting as a receptionist until a permanent person is employed.

E4: If you ticked 'partly' or 'not at all', describe what it is you still have to learn.

You may find it useful to revisit the 'Reflection' page and check on what it is you originally wanted to learn before you describe what it is you still need to learn.

E5: If you ticked 'partly' or 'not at all', explain why you think you didn't achieve your learning.

You may find it useful to revisit the 'Reflection' and 'Planning' pages to work out why you didn't achieve everything you set out to learn. It's all right for you not to have achieved all of your learning, but it is important that you explain why.

E6: If you ticked 'partly' or 'not at all', what do you intend to do next?

- Nothing, I've learnt enough for what I need
- Review this entry to see how I can achieve the outstanding learning
- Start a new CPD cycle at Reflection about what I still need to learn

**Plan and Record Appendix 3
Exemplar Record Sheets**



Royal
Pharmaceutical
Society
of Great Britain

The record sheets included here are master copies. Please photocopy. Do not write on these master copies – replacements will not be provided.

For learning that starts at Action

Date learning need identified 10/ 11/ 20 08 CPD no.
 Name of entry SSRIs – new advice on use in under 18s Entry no.

Action EXAMPLE FOR PHARM. TECHS

A1: Describe the activity you undertook that enabled you to learn something new.

Be specific about the activity you describe. If you read an article, give it a reference.

Read an article in the Pharmaceutical Journal 10/11/2008 about the safety of antidepressant use in children.

A2: Action category (optional)

- | | | | |
|---|---------------------------------------|---|---|
| <input type="checkbox"/> Brainstorming | <input type="checkbox"/> Colleagues | <input type="checkbox"/> Computer Aided Learning | <input type="checkbox"/> Workshops |
| <input type="checkbox"/> Distance Learning | <input type="checkbox"/> Friends | <input type="checkbox"/> Information Service | <input type="checkbox"/> Meetings |
| <input type="checkbox"/> Mentoring | <input type="checkbox"/> Postgraduate | <input type="checkbox"/> Certificate/Diploma/Degree | <input type="checkbox"/> Presentations |
| <input type="checkbox"/> Projects | <input type="checkbox"/> Secondment | <input type="checkbox"/> Short Course | <input type="checkbox"/> Symposium |
| <input type="checkbox"/> Structured Reading | <input type="checkbox"/> Teaching | <input type="checkbox"/> Tutoring | <input type="checkbox"/> Work shadowing |

A3: To what areas of competence does this learning objective relate? (optional)

Competence code	Competence description

A4: Describe what you actually learnt from this activity.

Try to describe this in terms of the skills, knowledge, attitudes and/or behaviours you have developed.

The MHRA (Medicines and Healthcare products Regulatory Agency) have issued advice on use of SSRIs in under 18s. The advice warns not to use any SSRIs for the treatment of depression in children other than fluoxetine.

Evaluation

E1: Give an example of how you've applied what you learnt to your practice.

Putting learning into practice is a good way to prove that you've actually learnt what you set out to. It may be a while before you apply what you have learnt. It's fine to leave this box blank and come back to it when you've had a chance to put your learning into practice. It's not enough just to write about what you intend to do.

I have advised patients, under 18 or if under 16, their parents, with repeat prescriptions for SSRIs to see their GP, to have their medication reviewed. I was able to contact two local GPs and advise them that patients of theirs were affected by this advice.

E2: How has what you learnt actually benefited your practice?

You might find it useful to consider how you, your service users, your colleagues and your organisation have actually benefited from your learning. Do include any feedback about your practice, formal or informal, that you've had from other people.

One of the local GPs expressed his gratitude to me for highlighting this issue to him and his patients. My manager was impressed that I responded in a positive manner to this information.

E3: What do you intend to do next?

Nothing, I've learnt enough for what I need

Start a new CPD cycle at Reflection about what I still need to learn

Appendix 4

Personal development plan

A personal development plan (PDP) is designed to structure the reflective process and to link your development, career and business plans to service needs and delivery through your CPD.

Your current job

The following questions will help you establish some CPD priorities relating to your current roles.

1. Describe up to three incidents in your workplace during the past year that caused you to feel that you had made a difference or were a personal and/or professional success.

2. Looking through your responses to the previous question, try to identify some thing or things you need to learn or improve on that might help you build on that success.

3. Describe up to three incidents in your workplace during the past year that caused you to feel uncomfortable, unhappy, ill-at-ease, threatened or simply fed-up.

4. Looking through your responses to the previous question, try to identify something or things you need to learn or improve on that might help you handle similar situations more effectively.

Your job in the future

The following four questions will help you establish how your current role(s) may change over the coming years, and how you may prepare for these changes.

5. If your workplace has a development plan for the next three years, briefly summarise the three points of that plan that will most affect you.

6. What do you need to learn in order to stay up to date with these three points?

7. If you work within the NHS, can you identify three local and national policies and priorities that will affect you, patients and other users of your services, and the organisation(s) for whom you work?

Your career

These questions should help you focus on your key career goals over the coming years.

8. What do you need to learn in line with each of these policies and priorities?

9. Looking at your career plans for the next three to five years, identify three new things that you want to be doing within that time frame.

10. What do you need to learn in order to achieve each of these career aspirations?

Appendix 5

Reviewer criteria (self-assessment of your record)

This section gives you an easy-to-use version of our reviewers' criteria, which they will use to mark your CPD record when the Society calls you for review. By checking your entries yourself against this list, you can get an idea of the sorts of things our reviewers will be looking for.

FOR LEARNING THAT STARTS AT REFLECTION
I have described what I want to learn to do.
I have described why this learning is relevant to my role.
I have described why it is important for me to complete this learning and I have indicated that my learning needs have been prioritised.
I have described the different options or activities I could choose from to learn what I want to do.
I have described how appropriate I think the different options or activities are.
I have ticked/indicated which activities I selected/decided to do.
I have described what I have learnt.
I have described an example of how I have applied something that I have learnt.
I have described a recent example from my workplace of how my learning benefited my practice.
Where I haven't learnt all that I set out to learn/wanted to learn, I have described what aspect I still need to learn about.
Where I haven't learnt all that I set out to learn/wanted to learn, I have described why I think this has not been fully achieved.
Where I haven't learnt all that I set out to learn/wanted to learn, I have indicated what I am going to do next.

FOR LEARNING THAT STARTS AT PLANNING

I have described the learning activity I am planning to do.

I have described why it is important for me to complete this learning activity and have indicated the priority of my learning needs.

I have described how appropriate this activity is to me in relation to what I want to learn about.

I have described a recent example of how I have applied something that I have learnt.

I have described a recent example from my workplace of how my learning benefited my practice.

FOR LEARNING THAT STARTS AT ACTION

I have given the date I completed the learning activity.

I have described what I have learnt.

I have described a recent example from my workplace of how I have applied my learning to my practice

I have described a recent example from my workplace of how my learning benefited my practice.

FOR LEARNING THAT STARTS AT EVALUATION

I have described how my learning has been applied to the area I work within.

I have described a recent example from my workplace of how my learning benefited my practice.

WITHIN MY WHOLE RECORD

I have circled the particular way in which I have identified my learning needs:

Appraisal Yes No

Audit Yes No

Peer review Yes No

Feedback from users Yes No

I have described the learning that is important to those who use my products and/or services. Yes No

Appendix 6

Competencies (optional)

Please note, **competencies for pharmacy technicians** can be found on the last page of Appendix 6.

Competencies are an optional field when you are making your CPD entries; some pharmacists and pharmacy technicians find them very useful in order to focus their learning, but others do not. If you do not find competencies useful or relevant to your line of work, you need not use them as our reviewers will not use this to assess your entry.

The RPSGB competencies for pharmacists and pharmacy technicians are just two out of a large number of competence frameworks related to different sectors of practice.

Competencies are like a picture of a typical (and very desirable!) pharmacist or pharmacy technician. They describe in detail the sorts of qualities that pharmacists or pharmacy technicians may aspire to.

Like many pictures, you may find that you're not a perfect match – that doesn't matter.

The first job is to decide which competence framework is most relevant to you. We've included a copy of the RPSGB competencies, but you may prefer to use local competence frameworks or one that's more relevant to your specialism. It is fine to work with the framework that seems the most appropriate to your current practice or to your future aspirations.

Whichever framework you choose, the next step is to decide which specific competencies within the framework are not relevant to you or your practice. Then have a look at the ones that are left. Think about whether there are any that you're lacking or that you're less confident about.

There's a good chance that you already have most of the qualities that a pharmacist or pharmacy technician needs. If you read the competencies and think "yes, I've got all of those qualities in abundance" then that's great. You may then want to reflect on what you need to learn in order to hang onto those qualities!

But if we're really honest then it's likely that you'll have some of the competencies, but may be less developed in others. If it's relevant to your current or future roles then these are areas you could focus on for your future development and for future CPD entries.

It's easy to get overwhelmed by competencies, so we'd recommend that you only choose a few specific competencies to develop at any given time.

General competences for pharmacists

These are a collection of competences that might apply to pharmacists working in any sector of practice and in any specialism. They are **not** core competences, and so they will not all be applicable to everyone.

Overview of the competency areas

- G1 Being a pharmacist
- G2 Interacting, and working with, people
- G3 Being personally effective
- G4 Being a manager
- G5 Upholding quality and continuous improvement
- G6 Helping others to learn and develop
- G7 Making decisions and solving problems
- G8 Working with information
- G9 Participating in research and development
- G10 Ensuring health and safety

G1 Being a pharmacist

- G1a** Using expert knowledge and skills to benefit patients
- G1b** Using expert knowledge and skills to assist other healthcare professionals
- G1c** Giving informed and accurate pharmaceutical advice
- G1d** Taking a patient-centred approach
- G1e** Making sound decisions and solving problems in relation to drug therapy
- G1f** Using clinical and pharmaceutical knowledge to optimise the balance among effectiveness, safety and cost of medicines
- G1g** Working within professional and organisational standards
- G1h** Complying with pharmacy legislation, ethics and regulatory body policies
- G1i** Working within boundaries of own professional expertise
- G1j** Applying knowledge of the NHS and working according to NHS systems
- G1k** Taking responsibility for the delivery of a pharmacy service to patients
- G1l** Acting with professional autonomy
- G1m** Keeping abreast of issues affecting pharmacy and pharmacists
- G1n** Maintaining awareness of political, economic and managerial aspects of healthcare
- G1o** Implementing national priorities
- G1p** Implementing and supporting policy on health education
- G1q** Promoting health and healthy lifestyles
- G1r** Sourcing and providing good quality medicinal products
- G1s** Recognising the contribution of, and collaborating with, other healthcare professionals
- G1t** Working across professional and organisational boundaries
- G1u** Working with sectors other than healthcare
- G1v** Signposting to other services
- G1w** Taking on new roles or responsibilities

G2 Interacting, and working with, people

- G2a** Demonstrating inter-personal skills, irrespective of the situation or the other person/people involved
- G2b** Demonstrating presentation skills
- G2c** Taking account of special communication needs in some circumstances
- G2d** Recognising barriers to communication
- G2e** Being assertive
- G2f** Treating all people with respect
- G2g** Leading teams and engendering common purpose
- G2h** Working to develop and maintain team relationships (pharmacy and inter-professional)
- G2i** Positively influencing individuals and organisations
- G2j** Negotiating effectively
- G2k** Minimising and resolving conflict
- G2l** Being supportive and motivational
- G2m** Maintaining and protecting privacy and confidentiality

- G2n** Utilising the skills and knowledge of others
- G2o** Responding to requests for advice or information

G3 Being personally effective

- G3a** Taking responsibility for own actions
- G3b** Reflecting on own performance and taking responsibility for self-development
- G3c** Recognising own limitations and referring to others when appropriate
- G3d** Working with confidence
- G3e** Being flexible
- G3f** Being self-motivated and self-reliant
- G3g** Setting and achieving personal and professional objectives
- G3h** Thinking broadly and outside traditional boundaries
- G3i** Being organised
- G3j** Managing time and prioritising
- G3k** Managing workload
- G3l** Coping with pressure and stress
- G3m** Being reliable
- G3n** Showing initiative
- G3o** Showing innovation
- G3p** Showing, or sharing, vision

G4 Being a manager

- G4a** Showing reasoning and judgement to manage situations
- G4b** Managing physical resources (see G2 and G6 for aspects of managing people)
- G4c** Managing finances
- G4d** Managing projects and activities
- G4e** Managing and facilitating change
- G4f** Overcoming obstacles in a changing environment
- G4g** Seeing opportunities for change and development
- G4h** Planning own work
- G4i** Planning work activities for a team
- G4j** Delegating appropriately
- G4k** Facilitating and encouraging the use of skill mix
- G4l** Planning strategically
- G4m** Recruiting and selecting staff
- G4n** Succession and contingency planning

G5 Upholding quality and continuous improvement

- G5a** Participating in professional audit
- G5b** Sharing and adopting good practice
- G5c** Adhering to standards of practice
- G5d** Developing standards of practice, protocols and operating procedures
- G5e** Adopting a reflective approach to practice
- G5f** Complying with non-pharmacy legislation related to own sphere of practice, e.g. laws related to data protection, employment, or discrimination
- G5g** Implementing, or contributing to, the clinical governance agenda
- G5h** Identifying and managing risk
- G5i** Applying the principles of quality assurance to own practice
- G5j** Challenging current practice
- G5k** Responding to complaints

G6 Helping others to learn and develop

- G6a** Supporting and advising others in their development
- G6b** Developing effective learning environments and learner support systems
- G6c** Helping others to take responsibility for their own learning
- G6d** Setting objectives and planning with learners

- G6e** Contributing to the design and planning of learning activities
- G6f** Teaching or training
- G6g** Creating and using coaching opportunities
- G6h** Supervising others
- G6i** Taking account of learners' needs and learning styles
- G6j** Using learning technologies appropriate to the context of the teaching/training
- G6k** Monitoring and evaluating own teaching/training
- G6l** Being a positive role model
- G6m** Being a mentor
- G6n** Facilitating others' CPD
- G6o** Linking education/training with practice
- G6p** Providing learners with opportunities to demonstrate their skills and knowledge
- G6q** Promoting self-appraisal
- G6r** Assessing others' knowledge
- G6s** Assessing others' performance
- G6t** Providing constructive feedback
- G6u** Reviewing others' progress

G7 Making decisions and solving problems

- G7a** Identifying the exact nature of a problem
- G7b** Identify key information and options to resolve the problem
- G7c** Using suitable approaches to resolve specific problems
- G7d** Making sound decisions after analysing information and options
- G7e** Following up to ensure a problem is resolved

G8 Working with information

- G8a** Obtaining relevant and up-to-date information
- G8b** Using a variety of information sources
- G8c** Recognising when an information source is not suitable or reliable
- G8d** Using a variety of information retrieval techniques
- G8e** Evaluating information to identify key points and discard irrelevant and poor information
- G8f** Applying evaluated information to practice
- G8g** Sharing information
- G8h** Ensuring the quality of information provided
- G8i** Recording data and information so that retrieval of key material is easily possible
- G8j** Manipulating data to extract key information
- G8k** Taking account of the limitations of information technology
- G8l** Using information technology

G9 Participating in research and development

- G9a** Demonstrating critical evaluation skills
- G9b** Identifying gaps in the evidence base
- G9c** Identifying research needs in the workplace
- G9d** Generating or creating evidence
- G9e** Developing and evaluating research protocols
- G9f** Applying research evidence in practice
- G9g** Supervising others in their research
- G9h** Establishing research partnerships
- G9i** Developing the service
- G9j** Participating in the development of healthcare policy

G10 Ensuring health and safety

- G10a** Complying with health and safety legislation
- G10b** Adopting safe working practices
- G10c** Accepting shared responsibility for the safety of the working environment

Competences for pharmacists working in community practice

Overview of the competency areas

- C1 Working with patients and the public to maximise the efficacy, safety and cost-effectiveness of medicines
- C2 Working with patients and the public to promote health
- C3 Addressing the health and medication needs of specific client groups
- C4 Working with other professions in healthcare and with other sectors
- C5 Working according to the NHS contract
- C6 Supplying medicines, dressings and appliances; and managing stock
- C7 Working in a business context

C1 Working with patients and the public to maximise the efficacy, safety and cost-effectiveness of medicines

- C1a** Assessing the medication needs of patients
- C1b** Reviewing medication for its clinical appropriateness
- C1c** Reviewing medication with patients to identify difficulties and potential risk, e.g. concordance issues, adverse effects, changing medication needs
- C1d** Monitoring indicators of disease progress, drug efficacy or drug toxicity
- C1e** Providing a pharmaceutical service to patients in their home
- C1f** Providing advice and counselling, e.g. related to minor ailments, medicines for purchase, appliances, self-care
- C1g** Participating in referral schemes to treat minor ailments
- C1h** Undertaking clinical audit
- C1i** Generating and maintaining records of medication supplied to patients
- C1j** Recording and reporting adverse drug reactions
- C1k** Documenting pharmaceutical care plans
- C1l** Producing and providing practice leaflets containing information about services available

C2 Working with patients and the public to promote health

- C2a** Providing information to promote public health and prevent disease
- C2b** Participating in national and local health campaigns and initiatives
- C2c** Creating and making use of opportunities to encourage healthy lifestyles
- C2d** Providing a smoking cessation service
- C2e** Screening and testing for chronic conditions
- C2f** Providing advice in relation to self-testing

C3 Addressing the health and medication needs of specific client groups

- C3a** Addressing the medication needs of patients transferring from one health/social care setting to another
- C3b** Providing pharmaceutical care to the elderly and their carers
- C3c** Providing pharmaceutical care to children and their carers
- C3d** Providing pharmaceutical care to patients who require palliative care in their own homes
- C3e** Providing pharmaceutical care to people with chronic conditions, e.g. asthma, diabetes, CHD, mental ill health
- C3f** Providing pharmaceutical care to people with specific dietary needs
- C3g** Providing services to drug misusers, including supervised administration and needle exchange
- C3h** Providing pharmaceutical care to people who use surgical appliances, hosiery and medical gases

C4 Working with other professions in healthcare and with other sectors

- C4a** Acting on referrals from GPs and NHS Direct
- C4b** Providing medicines-related information to other healthcare professionals
- C4c** Providing training and education to other healthcare professionals
- C4d** Evaluating drug information to assist other professionals
- C4e** Participating in the development and review of patient group directions, treatment protocols, formularies and guidelines
- C4f** Evaluating and reviewing medicines use and utilisation
- C4g** Working across professional boundaries
- C4h** Providing training and education to pharmacy staff
- C4i** Analysing and reviewing repeat prescribing
- C4j** Providing a pharmaceutical service to care homes, including intermediate care, and to hospices
- C4k** Signposting to other healthcare or social care provision

C5 Working according to the NHS contract

- C5a** Understanding, and working in accordance with, NHS terms of service and contract, including specifications of the Drug Tariff
- C5b** Analysing and evaluating prescribing data
- C5c** Developing and implementing new services under local or national contracts
- C5d** Participating in local accreditation schemes
- C5e** Providing services out of hours
- C5f** Premises design for dispensing and consulting services

C6 Supplying medicines, dressings and appliances, and managing stock

- C6a** Dispensing / managing the dispensing process
- C6b** Providing a repeat dispensing service
- C6c** Providing collection and delivery services
- C6d** Providing an emergency hormonal contraception service
- C6e** Supplying oxygen
- C6f** Managing stock, including correct storage
- C6g** Disposing of medication and participating in medication disposal schemes

C7 Working in a business context

- C7a** Analyse basic business problems, assess alternative choices, and propose actions
- C7b** Present, summarise, interpret and analyse economic and business data
- C7c** Buying and selling
- C7d** Marketing services and products to identified customer groups
- C7e** Premises design to meet business needs

Competences for pharmacists working in hospital practice

Produced with reference to the 2001 Audit Commission report *A Spoonful of Sugar: medicines management in NHS hospitals* and the 1996 NHS Scotland report *Clinical Pharmacy in the hospital pharmaceutical service: a framework for practice*

Overview of the competency areas

- HP1 Planning pharmaceutical care for individual patients**
- HP2 Providing medicines information and advice**
- HP3 Promoting the safety, efficacy and cost-effectiveness of medicines**
- HP4 Monitoring prescriptions**
- HP5 Identifying and managing risk to patients**

- HP6 **Optimising medicines administration**
- HP7 **Promoting health**
- HP8 **Evaluating medicines use**
- HP9 **Managing transfer to another healthcare setting**
- HP10 **Promoting quality and improving practice**
- HP11 **Managing formularies, guidelines and protocols**
- HP12 **Working across professional and organisational boundaries**
- HP13 **Reviewing and developing services**
- HP14 **Producing, using and maintaining records; using information technology**
- HP15 **Undertaking specialised activities**

HP1 Planning pharmaceutical care for individual patients

- HP1a Assessing the individual patient's pharmaceutical needs
- HP1b Conducting a structured patient interview
- HP1c Compiling a medication history/medication profile
- HP1d Taking account of the patient's medication history/profile and clinical records
- HP1e Taking account of risk factors (w.r.t. the patient and the medication)
- HP1f Liaising with other members of the patient's healthcare team
- HP1g Selecting, or advising on, suitable medication, dose, route, frequency, timing and duration
- HP1h Monitoring the patient's progress and outcomes
- HP1i Reviewing, monitoring and updating the pharmaceutical care plan
- HP1j Recording the pharmaceutical care plan and the advice given to the patient and members of the healthcare team

HP2 Providing medicines information and advice

- HP2a Keeping up-to-date with new products and therapeutic advances
- HP2b Anticipating and identifying the need for evaluated drug information to support formulary review or individual patient care
- HP2c Establishing the background to requests for drug information and advice from healthcare professionals and patients
- HP2d Participating in the education and training of other healthcare professionals
- HP2e Advising on the legal and ethical considerations of using medicines in ways which are not covered by a product licence
- HP2f Liaising with others in regard to clinical trials in progress in the ward or unit
- HP2g Providing advice on pharmaceutical aspects of clinical trial design, e.g. to research and ethical committees

HP3 Promoting the safety, efficacy and cost-effectiveness of medicines

- HP3a Reviewing prescribing
- HP3b Reviewing patients' medication, e.g. on admission
- HP3c Educating and training other healthcare professionals on the safe and effective use of medicines
- HP3d Training, advising and counselling patients and carers in medicines taking
- HP3e Educating groups, e.g. patient groups, school children
- HP3f Providing information leaflets and other written information
- HP3g Assessing and prioritising the education and counselling needs of patients
- HP3h Monitoring patients' understanding of information provided
- HP3i Recording education and counselling activities
- HP3j Training other healthcare staff to provide education and counselling on the use of medicines and appliances
- HP3k Involving patients and carers in the audit of education and counselling services
- HP3l Assessing future medicines cost pressures

HP4 Monitoring prescriptions

HP4a Ensuring that the medication prescribed, and the dose, route, frequency, timing and duration, are all appropriate to the patient and their diagnosis

HP4b Ensuring that the prescription is complete, unambiguous and le.g.al

HP4c Ensuring that the treatment is not duplicated by pharmacologically similar drugs

HP4d Ensuring that there are no incompatibilities, interactions, allergies or intolerance

HP4e Ensuring that the prescription complies with relevant formularies and prescribing policies

HP4f Ensuring that a new prescription is written when treatment is altered

HP4g Discussing necessary amendments with the prescriber and securing their agreement

HP4h Recording actions taken in the prescription monitoring process

HP4i Recording outcomes

HP5 Identifying and managing risk to patients

HP5a Ensuring that prescribing for individual patients takes account of predictable adverse effects

HP5b Ensuring that unnecessary drug use is avoided

HP5c Individualising drug dosage requirements

HP5d Identifying risk factors specific to the patient, e.g. their characteristics; social, environmental, functional, cognitive; aspects of their disease

HP5e Identifying risk factors in relation to the patient's medication, e.g. toxicity, availability, bioavailability, administration issues

HP5f Ensuring that patients receive cautionary and advisory labels and appropriate counselling in relation to the use of their medication

HP5g Identifying patients who will require close monitoring of their medicines administration

HP5h Educating and training pharmacy staff and other healthcare staff on the prevention, detection and reporting of ADRs

HP5i Monitoring patients for adverse reactions, including delayed effects

HP5j Participating in therapeutic drug monitoring

HP5k Using all sources of information that may be helpful in detecting and monitoring ADRs

HP5l Reporting, and encouraging others to report, ADRs

HP5m Monitoring patients for iatrogenic disease

HP6 Optimising medicines administration

HP6a Ensuring medication is administered correctly

HP6b Developing/managing self-administration schemes

HP6c Training staff involved in the administration of medicines

HP7 Promoting health

HP7a Providing health education information

HP7b Promoting healthy lifestyles and increasing awareness of current issues and guidelines

HP7c Screening for chronic conditions

HP7d Planning and managing vaccination and immunisation programmes

HP7e Participating in measures to minimise the spread of communicable diseases, e.g. in relation to travellers, sexual practices, drug misuse

HP7f Contributing to health protection initiatives

HP8 Evaluating medicines use

HP8a Identifying medicines which are suitable for medicines use evaluation

HP8b Defining acceptable standards for medicines use, with objective and measurable criteria

HP8c Measuring and documenting outcomes against the standards

HP8d Reporting results of medicines use evaluation to the clinical team

HP8e Recommending actions as a result of medicines use evaluation

HP9 Managing transfer to another healthcare setting

HP9a Collaborating with professionals to whom responsibility for the patient is to be transferred

HP9b Taking account of shared care protocols

HP9c Ensuring the patient receives appropriate counselling and advice on discharge

HP9d Writing/reviewing the discharge prescription

HP9e Reviewing the pharmaceutical care plan for the patient

HP9f Making arrangements for the necessary medicines, dressings and appliances to be supplied on time

HP9g Documenting the discharge/transfer and pharmaceutical care plans

HP9h Transferring information between the healthcare settings

HP10 Promoting quality and improving practice

HP10a Contributing to the clinical governance agenda

HP10b Managing risk

HP10c Managing/embracing change

HP10d Utilising the skills of other staff (skill mix)

HP10e Training and developing staff

HP10f Adopting reflective practice

HP10g Recognising responsibility and accountability

HP10h Taking an evidence-based approach to practice

HP10i Taking account of National Service Frameworks

HP10j Undertaking Continuing Professional Development

HP10k Participating in professional audit

HP10l Participating in clinical audit

HP10m Participating in peer review

HP10n Accepting performance review

HP10o Undertaking performance review of staff

HP10p Reducing medication errors

HP10q Learning from errors

HP10r Contributing to the development of quality standards

HP11 Managing formularies, guidelines and protocols

HP11a Developing formularies, guidelines and protocols in liaison with medical staff, nursing staff and other pharmacy colleagues

HP11b Ensuring that stocks of medicines held in treatment areas conform to the formulary

HP11c Ensuring that procedures are in place for the supply of formulary and non-formulary items

HP11d Reviewing formularies, guidelines and protocols in collaboration with medical, nursing and pharmacy staff

HP11e Ensuring that deviation from a formulary, clinical guideline or treatment protocol is the result of an active decision which involves the pharmacist

HP12 Working across professional and organisational boundaries

HP12a Working/liasing with primary care

HP12b Providing support to prescribers, e.g. reviewing repeat prescribing

HP12c Using and contributing to shared records

HP12d Providing intermediate care services

HP12e Providing palliative care services, e.g. to hospices

HP12f Developing joint care protocols

HP12g Working with NHS agencies

HP12h Working with sectors other than healthcare

HP13 Reviewing and developing services

HP13a Reviewing services

HP13b Developing new services

HP13c Developing 'whole system' prescribing

HP13d Redesigning processes

HP13e Redesigning medicines supply, e.g. original pack dispensing, automation

HP13f Improving procurement systems

HP14 Producing, using and maintaining records; using information technology

HP14a Using information technology, e.g. electronic records

HP14b Compiling information on patients' current and past drug treatments

HP14c Documenting a medication history/profile

HP14d Reviewing and maintaining medication records

HP14e Recording clinical interventions

HP15 Undertaking specialised activities

HP15a Supplementary prescribing (see separate competences for supplementary prescribers)

HP15b Participating in, or running, outpatient clinics

HP15c Producing aseptic and cytotoxic products in a specialised unit

HP15d Preparing sterile and non-sterile products extemporaneously in a licensed production unit

HP15e Managing an aseptic or production unit

HP15f Working in, or running, a quality assurance service

HP15g Preparing products for clinical trials

HP15h Preparing radiopharmaceuticals

Competences for preregistration tutors

PT1 Being a role model

PT1a Working to high professional and ethical standards

PT1b Maintaining a patient-centred focus

PT1c Maintaining a broad perspective; keeping abreast of professional and wider healthcare issues

PT1d Reflecting on performance and undertaking professional development

PT1e Managing time and prioritising

PT2 Being a people manager

PT2a Communicating at all levels

PT2b Treating all team members with respect

PT2c Engendering common purpose amongst the work team

PT2d Utilising the skills and knowledge of others

PT3 Being a trainer and coach

PT3a Supporting and advising others in their development

PT3b Empowering others to take responsibility for their own learning

PT3c Setting objectives with learners and planning training

PT3d Creating and using coaching opportunities

PT3e Taking account of learners' needs and learning styles

PT3f Encouraging self-appraisal

PT3g Providing feedback

PT4 Being an assessor

PT4a Providing learners with opportunities to demonstrate their competence

PT4b Assessing diverse sources of evidence

PT4c Reviewing progress

General competences for pharmacy technicians

Areas of competence for all pharmacy technicians

- TG1** Interacting, and working, with people
- TG2** Managing your work and self-development
- TG3** Managing a team or service
- TG4** Maintaining and improving the quality of your service
- TG5** Helping others to learn and develop
- TG6** Making decisions and solving problems
- TG7** Working with information, e.g. providing, retrieving and evaluating pharmaceutical information and giving advice
- TG8** Participating in research and development
- TG9** Ensuring health and safety
- TG10** Dispensing medicines and products
- TG11** Controlling stock of pharmaceutical materials and equipment
- TG12** Undertaking specialised activities, e.g. provision of education and development, audit
- TG13** Working with other professions in healthcare and with other sectors
- TG14** Managing risks
- TG15** Producing, using and maintaining records, using information technology
- TG16** Maintaining an awareness of issues affecting pharmacy and pharmacy technicians, e.g. code of ethics for pharmacy technicians.

Areas of competence for pharmacy technicians working in hospital pharmacy

- THP1** Planning and providing pharmaceutical care for individual patients
- THP2** Managing the use of medicines
- THP3** Participating in healthcare promotion
- THP4** Contributing to the clinical governance agenda (p.16)
- THP5** Reviewing and developing services
- THP6** Manufacturing and assembling sterile and non-sterile batch medicinal products
- THP7** Preparing pharmaceutical products aseptically

Areas of competence for pharmacy technicians working in community pharmacy

- TC1** Addressing the health and medication needs of specific client groups
- TC2** Working according to the NHS Contract
- TC3** Supplying dressings and appliances
- TC4** Assisting in the sale of OTC medicines and providing information to customers on symptoms and products
- TC5** Endorsing and processing prescriptions
- TC6** Planning and providing pharmaceutical care for individual patients
- TC7** Managing the use of medicines
- TC8** Participating in healthcare promotion
- TC9** Reviewing and developing services

Areas of competence for pharmacy technicians working in primary care organisations

- TPCO1** Managing formularies, guidelines and protocols
- TPCO2** Working according to the NHS contract
- TPCO3** Managing the use of medicines
- TPCO4** Participating in healthcare promotion
- TPCO5** Contributing to the clinical governance agenda
- TPCO6** Reviewing and developing services