

**UKMi Accredited
Medicines Information
Training Scheme
For Pharmacy Technicians**

Portfolio



Name:

Trust:

Personal Portfolio

To become accredited you must prepare a portfolio:

- using the UKMi scheme paperwork only. Paperwork prepared locally will **not** be accepted.
- and complete all the aspects of accreditation relevant to the types of enquiries for which you are seeking accreditation (see summary of achievements, form 1).

The portfolio must contain:

- ✓ **Title page – complete with own name and Trust name**
- ✓ **Application form**
- ✓ **Summary of achievements (Form 1)**

- ✓ **C.V.s**
 - Candidate
 - Mentor

- ✓ **Pre-course work**
 - **Policies and procedures**
Relevant procedures in portfolio, (with actions appropriate to Technician highlighted).
Working knowledge of procedures log (Form 2)
 - **Practical tasks**
Objective evidence of completion of tasks i.e. Task log (Form 3)

- ✓ **UKMi National Training Course**
 - Certificate of attendance

- ✓ **Skills Assessment**
 - Objective evidence of discussion of the results of self-assessment of skills (Form 4)
 - Details of development of skills (Form 5)

- ✓ **Practice Enquiries**
General Competencies log sheet (p8-9)
Specific competencies log sheets for EACH category (p10-16)
 - Practice enquiries are clearly identified on log sheets
 - Minimum of 5 occasions for each competency (NB. If ≥ 2 years experience max of 4 may be retrospective)
 - Information on enquiry sheets corresponds to checklists

- ✓ **Assessed Enquiries**
General Competencies log sheet (p8-9)
Specific competencies log sheet for EACH category (p10-16)
 - Assessed enquiries are clearly identified on log sheets

- Minimum of 5 occasions for each competency (NB. retrospective evidence may not be included for the purposes of assessment)
- Feedback documented (Form 6)
- Dates on enquiry sheets correspond to assessments
- Information on enquiry sheets corresponds to checklist

- ✓ **Assessed Member of Public Enquiries**
 - Assessment sheet documenting feedback on five enquiries
 - Five anonymised enquiries

- ✓ **Assessment feedback form (Form 6)**

One form for each enquiry category for practice and assessed enquiries.

- ✓ **Supplementary evidence form (Form 7)**

This form should be used for:

 - any competencies not covered during the practice enquiries or observed assessments.

- These have been marked for accuracy by assessor/mentor.

- ✓ **Completed Enquiry sheets**
 - Photocopies of enquiries answered to demonstrate competence, referenced to competency sheets.

- ✓ **Reviews with Mentor**
 - Copies of reviews (minimum of 5) documented on Review record form (Form 8)

- ✓ **Copy of letter to Course Director**
 - Support of application for assessment/accreditation

Please review your portfolio against this list prior to submitting it for the final assessment interview.

Summary of Achievements (Form 1)

Name.....Trust.....

Stage	Evidence required				Evidence in portfolio ✓/x
Pre-course work					
<i>Working knowledge of procedures log</i>					
<i>Procedures (with actions appropriate to technician highlighted)</i>					
<i>Task 1 + log</i>					
<i>Task 2 + log</i>					
<i>Task 3 + log</i>					
<i>Task 4 + log</i>					
<i>Task 5 + log</i>					
<i>Task 6 + log</i>					
Three day residential induction certificate					
Skills assessment form					
Tasks completed to develop skills form					
Enquiry types – MINIMUM OF 4	✓	<i>5 Practice Occasions</i>	<i>5 Observed Assessments</i>	<i>10 Enquiry Sheets</i>	
Identification of Pharmaceuticals					
Availability of medicines					
Pharmaceutical - Stability					
Pharmaceutical - Formulation					
Interactions - retrospective and prospective					
Adverse Drug Reactions					
Complementary medicine - Herbal					
Travel medicine – with vaccines					
		<i>5 assessed enquiries</i>			
Member of Public					
Reviews (minimum of FIVE)					

We verify that the above named technician has satisfactorily completed the scheme and recommend them for assessment

Signed

Mentor _____

Date _____

Senior Pharmacy Manager _____

Date _____

Date of portfolio assessment _____

Signed _____

Date of assessment interview _____

PASS / REFER / FAIL

Actions / next steps

Signature of Chair of assessment panel: _____

Working knowledge of procedures log (Form 2)

Name.....**Trust**.....

Title of Procedure	Questions answered correctly ✓ / ✗			Comments – to include details of at least one question per SOP
	1	2	3	

The technician has demonstrated an understanding of all relevant procedures

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

Task Log (Form 3)
Complete one for each task

Name Trust

Details of task

What have you learnt from this task?

Comments / Suggestions from Mentor

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

Skills Assessment (Form 4)

Name Trust

The technician and mentor should reflect on the technician's performance and identify examples for discussion. Some competencies are considered core (*) and some are optional (#). Optional skills should be assessed according to local need/practice. Space is left to add any extra skills (if necessary) that are particular to the individual technician or according to local need/practice.

Skills	Technician's self assessment ✓ = competent ✗ = area for development N/A = not applicable	Mentor's assessment ✓ = competent ✗ = area for development N/A = not applicable
Listening skills *		
Telephone skills *		
Oral communication skills *		
Questioning skills / Information gathering *		
Searching skills * - paper based - computer based		
Good attention to detail *		
Provide information in an appropriate format *		
Writing skills *		
Computer skills *		
Professionalism *		
Analytical skills *		
Critical thinking skills *		
NICE Evidence*		
Use Medline #		

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

Details of development of skills (Form 5)

Name.....Trust.....

Details of how skills have been developed:

Comments / Suggestions from Mentor

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

General Competencies Log Sheet

1 of 2

Note: These competencies apply to all enquiry categories.

Documentation of meeting competencies is required for FIVE occasions ONLY, however ALL enquiries must meet these standards.

Date:																			
Practice enquiry (P) or Assessed enquiry (A):																			
Portfolio reference no:																			
<i>You must always:</i>																			
Respond to enquirer promptly, introducing the department and yourself in a friendly and courteous manner																			
Identify the enquirer																			
Briefly identify the scope, nature and purpose of the enquiry and decide if it is appropriate to proceed or refer																			
Accurately document all enquirer details																			
Accurately document all patient details (where necessary)																			
Accurately identify all background information necessary to process enquiry																			
Identify a mutually appropriate time for response																			
Follow procedures for ensuring that the enquiry is screened by the supervising Pharmacist																			
Plan, organise and document your search																			
Identify appropriate reference sources																			
Read and evaluate information with attention to detail																			
Identify alternative source(s) if necessary																			
Refer to the supervising Pharmacist if necessary																			
Document the information retrieved and the sources used																			
Prepare a concise, relevant and logical answer that meets the needs of the enquirer																			
Prepare to answer any follow up questions																			
Perform a self check to ensure that the information retrieved corresponds accurately to the information requested																			

General Competencies Log Sheet

2 of 2

Note: These competencies apply to all enquiry categories.

Ensure the supervising Pharmacist checks the enquiry prior to the answer being relayed										
Relay answer/progress to the enquirer at the agreed time and in an appropriate format.										
Information must be relayed appreciating the need for confidentiality										
Confirm that the answer given meets the needs of the enquirer										
Document any further information required										
Complete all documentation for enquiry according to Standard Operating Procedures										
Store documentation according to Standard Operating Procedures										
Evidence requirements:										
All performance criteria must be achieved on a minimum of 5 occasions										
Signatures (initials)										
Technician										
Mentor										

Competencies for answering IDENTIFICATION OF PHARMACEUTICALS enquiries

Date:																				
Practice enquiry (P) or Assessed enquiry (A):																				
Portfolio reference no:																				
Background Information:																				
1. Establish why identification of preparation is needed																				
2. Identify who tablet/capsule or other form of preparation belongs to																				
3. Identify if the preparation is available to enquirer or if information has been relayed																				
4. Identify description of preparation including any markings																				
5. Identify the size																				
6. Identify the colour																				
7. Identify where it was found																				
8. Establish if the enquirer knows what the preparation might be																				
9. Establish if there is a possibility that it is a foreign medicine and if possible the medical purpose																				
10. Identify the country, if it is a foreign medicine																				
Reference Sources:																				
<i>Please indicate which sources have been used including local resources</i>																				
<i>(Minimum should be UKMi essential sources)</i>																				
1																				
2																				
3																				
4																				
5																				
6																				
Evidence requirements:																				
All performance criteria must be achieved on a minimum of 5 occasions.																				
Signatures (initials)																				
Technician																				
Mentor																				

Competencies for answering AVAILABILITY of medicines enquiries

These should include a minimum of 2 enquiries from both 6 or 7 or supplementary evidence

Date:																				
Practice enquiry (P) or Assessed enquiry (A):																				
Portfolio reference no:																				
Background Information:																				
1. Identify the enquirer's understanding regarding the lack of availability																				
2. Identify if the enquiry concerns an actual shortage																				
3. Identify how to spell product name																				
4. Identify if product is for a one-off patient or for regular use (short term / long term)																				
5. Identify how enquirer became aware of product																				
6. Identify if the enquiry concerns sourcing a product from a UK supplier																				
OR																				
7. Identify if the enquiry concerns sourcing an international product																				
8. Identify if possible from which country																				
Reference Sources:																				
<i>Please indicate which sources have been used including local resources</i>																				
<i>(Minimum should be UKMi essential sources)</i>																				
1																				
2																				
3																				
4																				
5																				
6																				
Evidence requirements:																				
All performance criteria must be achieved on a minimum of 5 occasions.																				
Signatures (initials)																				
Technician																				
Mentor																				

Competencies for answering PHARMACEUTICAL enquiries

(Formulation & Stability only. Excluding parenteral administration)

These are two enquiry categories, a minimum of five enquires are required for each sub-type

Date:																				
Practice enquiry (P) or Assessed enquiry (A):																				
Portfolio reference no:																				
Background Information:																				
<i>Stability sub-type only:</i>																				
1. Identify product																				
2. Identify the nature of the problem e.g. factors affecting the stability of the product i.e. light, temperature and humidity																				
3. Identify potential problems arising from product being stored inappropriately																				
<i>Formulation sub-type only:</i>																				
1. Identify product																				
2. Identify problem e.g. allergy, intolerance, fluid restriction, difficulty in swallowing, tube feeding																				
3. Identify if it is a long term or short term problem																				
Reference Sources: <i>(Minimum should be UKMi essential resources)</i>																				
<i>Please indicate which sources have been used including local resources</i>																				
1																				
2																				
3																				
4																				
5																				
6																				
Evidence requirements:																				
All performance criteria must be achieved on a minimum of 5 occasions.																				
Signatures (initials)																				
Technician																				
Mentor																				

Competencies for answering INTERACTIONS enquiries

Date:										
Practice enquiry (P) or Assessed enquiry (A):										
Portfolio reference no:										
Background Information:										
1. Identify medicines suspected to interact, doses and whether already taken										
2. Identify indications for medicines										
3. Identify if any other medicines are being taken										
4. Identify if an interaction has occurred										
5. Identify timing of effect in relation to drug administration, if a suspected interaction has already occurred,										
6. Identify nature / effects of interaction if a suspected interaction has already occurred										
Reference Sources:										
<i>Please indicate which sources have been used including local resources</i>										
<i>(Minimum should be UKMi essential resources)</i>										
1										
2										
3										
4										
5										
6										
Evidence requirements:										
All performance criteria must be achieved on a minimum of 5 occasions.										
Signatures (initials)										
Technician										
Mentor										

Competencies for answering ADVERSE DRUG REACTIONS enquiries

Should include a minimum of 2 retrospective and prospective enquiries or supplementary evidence

Date:										
Practice enquiry (P) or Assessed enquiry (A):										
Portfolio reference no:										
Background information:										
<i>General ADR</i>										
1. Identify if the enquiry is retrospective, prospective or general										
2. Identify if the enquiry relates to a legal case										
3. Identify an accurate / specific description of the reaction and its severity										
4. Identify when the reaction appeared/disappeared in relation to commencing/altering dose or withdrawal of therapy										
5. Confirm whether manufacturer and / or Commission on Human Medicines (CHM) are to be notified										
Reference Sources:										
<i>Please indicate which sources have been used including local resources</i>										
<i>(Minimum should be UKMi essential resources)</i>										
1										
2										
3										
4										
5										
6										
Evidence requirements:										
All performance criteria must be achieved on a minimum of 5 occasions.										
Signatures (initials)										
Technician										
Mentor										

Competencies for answering HERBAL MEDICINES enquiries

Date:											
Practice enquiry (P) or Assessed enquiry (A):											
Portfolio reference no:											
<i>When answering enquiries on complementary medicines please use in conjunction with the relevant enquiry category and ensure the enquiry is clearly cross-referenced.</i>											
Background Information:											
1. Ensure product is herbal (not homeopathic or for aromatherapy)											
2. Identify supplier (if appropriate)											
3. Identify if the product has already been taken or is to be taken											
4. Identify why patient takes or wishes to take product											
5. Identify which other enquiry category is involved ie identification, availability, adverse drug reactions or interactions											
Reference Sources:											
<i>Please indicate which sources have been used including local resources</i>											
<i>(Minimum should be UKMi essential resources)</i>											
1											
2											
3											
4											
5											
6											
Evidence requirements:											
All performance criteria must be achieved on a minimum of 5 occasions.											
Signatures (initials)											
Technician											
Mentor											

Competencies for answering TRAVEL MEDICINE enquiries

Date:																				
Practice enquiry (P) or Assessed enquiry (A):																				
Portfolio reference no:																				
Background Information: <i>(for both sub-types)</i>																				
1. Identify if the enquiry is client specific																				
2. Identify if there are any children travelling, if so, age(s)																				
3. Identify where the client is travelling to - country/countries and specific area(s)																				
4. Identify when the travelling will commence and for what duration																				
5. Identify what type of accommodation will they be staying in																				
6. Identify if any other medicines are being taken																				
7. Identify any medical conditions																				
8. Identify vaccine history																				
9. Identify if up-to-date with standard vaccines																				
10. Identify if they have had any additional vaccines																				
Reference Sources:																				
<i>Please indicate which sources have been used including local resources</i>																				
<i>(Minimum should be UKMi essential resources)</i>																				
1																				
2																				
3																				
4																				
5																				
6																				
Evidence requirements:																				
All performance criteria must be achieved on a minimum of 5 occasions.																				
Signatures (initials)																				
Technician																				
Mentor																				

Assessment Feedback Form (Form 6) for practice and assessed enquiries

Enquiry category: _____

Enquiry type Practice / Assessed	Portfolio reference no.	Date	Feedback	Pass/ Fail	Assessor's signature & date

Member of Public Enquiry answer assessment form

Name	
Mentor	

For the Member of Public accreditation five enquiries answered to UKMi Audit Standards which have been observed and assessed by the mentor must be submitted.

The enquiries should be wherever possible from the enquiry types from which the technician is applying for accreditation. However if there are insufficient numbers from these enquiry types then other Level One enquiries may be used.

Anonymised copies of the enquiries must be submitted with the assessment forms.

UKMi guidance for the definition for ranking enquiries and criteria for grading answers to enquiries are on pages 20 and 21.

1	Enquiry No.		Date of enquiry		
	Enquiry Title				
	<i>Documentation</i>	<i>Analysis</i>	<i>Coverage</i>	<i>Answer</i>	Total (Max=20)
Level	Comments: D: A: C: Ans:				General Comments
2	Enquiry No.		Date of enquiry		
	Enquiry Title				
	<i>Documentation</i>	<i>Analysis</i>	<i>Coverage</i>	<i>Answer</i>	Total (Max=20)
Level	Comments: D: A: C: Ans:				General Comments

3	Enquiry No.			Date of enquiry	
	Enquiry Title				
	<i>Documentation</i>	<i>Analysis</i>	<i>Coverage</i>	<i>Answer</i>	Total (Max=20)
Level	Comments: D: A: C: Ans:				General Comments
4	Enquiry No.			Date of enquiry	
	Enquiry Title				
	<i>Documentation</i>	<i>Analysis</i>	<i>Coverage</i>	<i>Answer</i>	Total (Max=20)
Level	Comments: D: A: C: Ans:				General Comments
5	Enquiry No.			Date of enquiry	
	Enquiry Title				
	<i>Documentation</i>	<i>Analysis</i>	<i>Coverage</i>	<i>Answer</i>	Total (Max=20)
Level	Comments: D: A: C: Ans:				General Comments

Definition for ranking enquiries (Appendix 5 UKMi AUDIT Standards and toolkit, UKMi Clinical Governance Working Group, November 2010)

These definitions are used to characterise enquiries. Note the level is independent of the time taken to complete the enquiry or the method used to communicate the answer. Please also note there is a degree of subjectivity when assessing levels; no system can completely remove this. The way an enquiry is received may partly determine its level. The questioning skills of experienced MI staff may turn an apparently straightforward level 1 enquiry into a level 2 or 3 once the full clinical implications have been teased out. Therefore the examples below are for guidance only, some categories of enquiry may sometimes fit better into another, e.g. enquiries about drugs in pregnancy and lactation (listed as levels 2 and 3) may sometimes fit into level 1, if the drug concerned is widely used in pregnancy and its safety is well known (e.g. iron).

Level 1. Simple enquiries – answered using data from one or two standard sources.

[MiDatabank label: "Simple enquiries or data"]

Level 1 enquiries are generally requests for information which any pharmacist or accredited pharmacy technician would be expected to deal with using readily available sources. These can be answered using authoritative general reference texts e.g. BNF, SmPC, Martindale. However, enquiries answered solely using sources such as local formularies/guidelines, paediatric formularies, and electronic databases such as Drugdex would also be considered level 1.

For level 1 enquiries, the information found in the above sources can be passed on to the enquirer without further evaluation or interpretation. Many types of enquiry fit into this category. Common examples include:

- requests for standard dosing information and/or administration instructions for licensed, or commonly accepted unlicensed indications;
- basic information about well-documented adverse effects;
- identification of foreign drugs
- tablet identification using TICTAC (either directly or by contact with the regional MI centre);
- 'librarian services' such as finding a particular reference on Medline for which some details are known;
- requests to contact the pharmaceutical industry for basic information about the availability, or excipient content.

Level 2. Complex enquiries – requiring the use of multiple and more specialist sources where the available evidence provides a reasonably clear answer or course of action.

[MiDatabank label: "Complex enquiries – multiple sources"]

Level 2 enquiries require the use of more specialist resources and/or the interrogation of multiple sources. The application of medicines information skills and knowledge is needed, but sources provide a reasonably clear answer or course of action to offer the enquirer.

This is a broad category of enquiries comprising those that either require use of information sources in addition to those outlined under level 1, or require some evaluation and interpretation to be applied to a specific situation. Examples include:

- dosing information for unlicensed indications;
- intravenous compatibilities not likely to be found in the SPC/data sheet e.g. admixtures or Y-site compatibilities;
- dosing adjustments for commonly-used drugs in organ failure
- checking for previous case reports of an adverse drug reaction;
- advice on drugs in pregnancy/lactation where published reviews give clear advice (but see below).

Level 3. Complex enquiries – in the absence of a clear answer or course of action from available sources, professional judgement is used to provide advice to the enquirer. This may require the specialist evaluation of multiple sources and the evaluation of primary literature.

[MiDatabank label: "Complex enquiries – professional judgement"]

The emphasis in this level of enquiry is on professional judgement and accountability. A major component of the answer comes from the knowledge, experience and skill of the MI practitioner. This means that core concepts of therapeutics, risk management and literature evaluation are applied to construct an answer. Examples include:

- Identifying the most likely causative agent of an adverse drug reaction and advising how to manage the patient.
- Offering advice on an appropriate therapeutic regimen when standard options have failed and there is no literature consensus.
- Evaluating the safest and most effective treatment where there are multiple contra-indications or cautions.
- Calculating drug doses using the first principles of pharmacokinetics or therapeutic drug monitoring.
- Assessing appropriateness of new/ experimental treatments for a patient by appraising published clinical data.
- Advising on the safest injectable medicines to mix when mixing is unavoidable but there is no directly relevant published compatibility data.

Enquiries that are likely to fall into this category include those regarding comparative effectiveness or safety of treatments, and situations where individual patients have unusual co-morbidities or drug combinations.

Criteria for grading answers to enquiries (Appendix 6 UKMi AUDIT Standards and toolkit UKMi Clinical Governance Working Group November 2010)

	CORRECT – score 5	INCOMPLETE – score 1-4	INCORRECT – Score 0
Documentation (Standards are the same for all levels of complexity)	Record is complete <i>i.e.</i> <ul style="list-style-type: none"> legible; with correct spelling and no unfamiliar abbreviations; enquirer details complete (full name, address/contact). patient's details are present if relevant, the question is documented to allow a third party to tackle it without further contact with the enquirer; details of resources are complete; names of others contacted with regard to the enquiry are recorded; there is a concise summary of the answer. 	Record is complete to the extent that <ul style="list-style-type: none"> it is legible, enquirer details are sufficient to permit the enquirer to be traced, or a statement that enquirer wished to remain anonymous is present. a summary of the answer is present, but there are one or more deficiencies, e.g. as follows: <ul style="list-style-type: none"> enquirer details are incomplete, e.g. first name and department only, patient details (if appropriate) are missing or incomplete, documentation of resources used is incomplete. 	There are key omissions <i>i.e.</i> <ul style="list-style-type: none"> the record is illegible contact name and/or means of contact are missing. the question and/or answer cannot be understood.
Analysis (As above)	The form shows evidence that the question has been fully understood, and that sufficient, relevant background information has been obtained.	Some relevant information (useful but not essential) is missing which may have assisted in providing a more comprehensive answer. Implications of enquiry not fully understood.	Question does not appear to have been understood no background information. Omissions in enquiry.
Coverage (Standards depend on level of complexity)	Level 1 – Simple enquiries - answered using data from one or two standard sources.		
	Shows evidence of use of relevant authoritative resources or (if appropriate) accurate and up-to-date personal knowledge.	Accurate but not comprehensive personal knowledge used. Answer might have been improved by use of additional/alternative resources.	Inaccurate personal knowledge used. Answer not supported by relevant resources.
	Level 2 – Complex enquiries – requiring the use of multiple and more specialist sources where the available evidence provides a reasonably clear answer or course of action.		
	Relevant authoritative general resources have been used. In addition, databases, in-house files and more specialised resources have been used where appropriate. It is unlikely further useful information would be gained by further resource use.	There is evidence appropriate resources have been used but omissions are apparent, and/or resources have not been used in a systematic fashion (<i>i.e.</i> authoritative references first, then more specialised resources if needed). Useful information may have been missed.	Key texts appear to have been omitted. It is likely that important information has been missed.
	Level 3 – Complex enquiries – in the absence of a clear answer or course of action from available sources, professional judgement is used to provide advice to the enquirer. This may require the specialist evaluation of multiple sources and the evaluation of primary literature.		
As for level 2. In addition, where necessary, a thorough search of the literature has been conducted.	As for level 2, and/or incomplete use of bibliographic databases where use of these was necessary.	Key resources omitted. It is likely that <i>important</i> information was missed.	
Answer (Standards depend on level of complexity)	Level 1 – Simple enquiries - answered using data from one or two standard sources.		
	Evidence that the answer is accurate and based on comprehensive knowledge supported by appropriate resources where necessary. The answer has been communicated at a suitable level (use of language) and by an appropriate method.	The answer appears to be accurate and supported, but there may have been some problems, e.g. as follows: <ul style="list-style-type: none"> level of detail inadequate; inappropriate level/ method of communication. 	The answer is inaccurate, or the enquiry has not been answered at all, and/or there has been a serious failure in communication.
	Levels 2 and 3– Complex enquiries – multiple sources and professional judgement.		
Evidence that comprehensive knowledge and thorough consideration of the issues have been used. The information has been evaluated in a logical fashion. Skill in interpreting the information and application to individual circumstances are demonstrated. Calculations are correct. The answer has been communicated at a suitable level (use of language) and by an appropriate method.	Accurate information has been supplied but there are deficiencies e.g. in one or more of the following areas: <ul style="list-style-type: none"> some issues relevant to the answer have been overlooked; the information has been passed on without evaluation, or insufficient evaluation; level of detail inadequate; inappropriate level/ method of communication. 	The answer is inaccurate, or the enquiry has not been answered at all, and/or there has been a serious failure in communication.	

Supplementary Evidence Form (Form 7)

Competency: _____

Portfolio reference number: _____

Evidence to demonstrate knowledge/understanding

Comments / suggestions from mentor

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

Review Record Form (Form 8)

Name.....**Trust**.....

This document will be used as part of the information reviewed by the assessment panel.

Points discussed

-
-
-
-
-

Action plan

-
-
-
-
-

Technician comments on review of performance

Mentor comments on review of performance

Technician's signature _____ Date _____

Mentor's signature _____ Date _____

Verification of supporting pharmacists

Special note: This form should be used where pharmacists other than the mentor are supervising the work of the technician in the absence of the mentor. It is the responsibility of the mentor to ensure that such pharmacists are sufficiently competent in MI and familiar with the scheme, to ensure appropriate support and application of the scheme criteria. The number of such pharmacists should be kept to a minimum to ensure consistency and should only be used on an occasional basis. **The mentor should undertake the majority of supervision and assessment against the scheme criteria.**

Name	Signature	Position / MI experience / Time spent in MI	Portfolio reference numbers

Signed: _____ (Mentor)

Date: _____