

# Policy for Checking Portfolio Assessment



## 1. POLICY STATEMENT

The PACT training programmes requires a trainee PACT to complete and submit a work based checking portfolio containing a minimum of 1000 accurately checked items.

This policy outlines the process for the completion, submission and marking of that portfolio. It also outlines the policy for retention/return of the portfolios.

## 2. PURPOSE

The purpose of this policy is to provide a consistent and transparent approach to the assessment of PACT trainee's checking portfolios.

## 3. POLICY

### Completion, submission and marking:

- 3.1. PACT Trainees must document their checking portfolio accurately and completely. They must submit the physical copies (original), by courier, to the training organisation for marking. All the portfolio documents required (appraisals, appendix forms , checking log items, final checker signature log) must be submitted to the required standard before the portfolio will be assessed.
  - Pharmacist/PACT signature log
  - Checking log(s) – 1 or 2 attempts
  - Dispensing Error log (appendix 3)
  - Checking error log (appendix 4)
  - 2 or 3 Appraisals completed by the Preceptor, as deemed necessary by the log
- 3.2. The PACT preceptor must complete and document at least two appraisals. These must be submitted by the PACT together with the Checking Portfolio and other required documentation.
- 3.3. The submitted portfolio will be assessed on its overall accuracy and completeness - all the portfolio documents required (appraisals, appendix forms , checking log items, final checker signature log) must be submitted to the required standard before the portfolio will be assessed.

3.4. The portfolio and appraisals will be reviewed by PSNZ Education Training & Professional Development to ensure:

- Completeness (all required documents have been submitted and the log contains no omissions or gaps)
- Accuracy (( all pages are numbered chronologically, include no duplicates or omissions, all errors correctly recorded in the appropriate appendix )
- Legibility– all documents submitted for assessment must be legible and clear.
- Error forms (Appendix 3 & 4) must be completed for each error found and provide sufficient detail for marker to review and assess.
- All requirements of both assessments have been met ((number of items checked, errors have not exceeded allowable amounts)

3.5. Outcome of portfolio review

- i. If the submission is complete and all requirements met, the portfolio and appraisals will be assessed by a programmes pharmacist from PSNZ Education Training & Professional Development.
- ii. If the submission is NOT complete the portfolio will not be assessed. Resubmission of the complete portfolio will be requested. The trainee will have a maximum of THREE portfolio submissions. If the third and final submission is still not complete and accurate, PSNZ will decide on a case by case basis whether continuation in their current cohort will be granted.  
If continuation is permitted, then there will be a minimum of a three months stand down.
- iii. If the assessor determines the submitted log has not met the required criteria (refer Policy for PACT Training Programme Assessment and Reassessment) then the PACT trainee may be required to complete another log. The number of items to be checked will be determined case-by-case by the PACT assessor and will reflect the degree of the portfolio's inaccuracy.

**Retention/Return of portfolios:**

3.6. Once the portfolio has been reviewed, marked as complete and the PACT Trainee has met all requirements to be eligible to sit the final assessments, then the portfolio will either be:

- returned to the trainee by tracked courier (at their request), OR
- discarded using secure document destruction.

The marker's review sheet will be scanned and uploaded to the trainee's learning platform.

**4. RELATED DOCUMENTS**

- **PACT Training Framework**
- **PACT Portfolio documents**
- **Policy for PACT Training Programme Assessment and Reassessment**
- **Policy for PACT Training Programme Assessment and Reassessment DOCUMENT CONTROL**

## PACT Policy for Management of PACT Trainee's Checking Portfolio

Position Responsible: PACT Programme Manager

Date Approved: November 2021

Review Date: November 2023

Signed:

Version 1	November 2021	
Version 2	December 2022	Review and clarified management and assessment process