

SECTION 10

Standard National Family Medicine Postgraduate Portfolio Assessment Tool (PAT): Annual assessment

Three satisfactory annual portfolio scores ($\geq 60\%$) are needed for verification to the CMSA that the candidate is ready for the Final Part A Exam in 4th year. The annual score will also be used by the university for its own assessment purposes. Numbers 1-6 below add up to 90 points and can be completed by a competent administrative person as the information is already in the portfolio, while the HOD/Program manager completes point 7 (.../10), to give a final score out of 100.

1. A learning plan (section 3) for each allocation undertaken and a minimum of 2 per year. Missing learning plans should be scored as zero. Check when the registrar joined the programme, and adjust for this, for example if registrar joined in Aug, then there may be only one learning plan. If there are more than 2 learning plans, but one is not scored, take the average score of those scored. Take the average of the scores for each learning plan as the score for the year.

Learning plans	First learning plan score 6	Second learning plan score 9	Third learning plan score 10	FINAL AVERAGE (...../10): 8
----------------	--------------------------------	---------------------------------	---------------------------------	--------------------------------

2. Report/Reflection on Allocations (Section 3): **Portfolio cannot be seen as acceptable overall if a report is missing.** In the portfolio there is a global assessment out of 10 that can be used as an overall score for the allocation. Take the average of the scores for each allocation as the score for the year.

Supervisor report	First report score 7	Second report score 9	Third report score 8	FINAL AVERAGE (...../10): 8
-------------------	-------------------------	--------------------------	-------------------------	--------------------------------

3. Add up the number of hours recorded for educational meetings (round each meeting to the nearest half hour) (section 4) and divide the total by 4 to give a score for the year. The max score possible is 10. In addition give 2 points for each national outcome addressed, if it appears at least once in the portfolio (A, B, C, D, E, F) to a max of 10. Add the two scores together to give a final score for the year out of 20.

Educational Meetings 24/4	Score for hours (Total hours/4)= 6	2 Points per outcome A-F ABDF	A, B, C, D, E, F Score for categories = 8	TOTAL (..../20): 14/20
------------------------------	---------------------------------------	----------------------------------	--	---------------------------

4. Observations of consultations, procedures done and training presented (section 5). At least one must be a scored teaching activity.

Year one and two of training: Actual scores are not entered here, but the number of observations done, so if 7 were done, the score is 7, if 23 were done, the score is 23, with a final max score of 10.

Total number of observations for the year:	MAX SCORE = 10: 10
--	----------------------------------

Year three and four of training: Calculate the average score for the 10 best observations. Each observation should already have been scored out of 10. Missing observations should be counted as zero (if there are less than 10 observations). At least one must be a scored teaching activity. Three of these will contribute directly to your final grade in the FCFP examinations.

Observations (each scored/10)	1	2	3	4	5	6	7	8	9	10 (Teach)	FINAL AVERAGE (...../10)
-------------------------------------	---	---	---	---	---	---	---	---	---	------------	--------------------------

5. Course assignments (already assessed in course). **At least one assignment is required from each of the 5 key areas by the end of 3 years** (the placing of assignments in the programme will vary between institutions). There should be at least one new assignment per year. An average score is calculated for all of the assignments at the end of each year. The final average score should be reduced to a score out of 10. If an assignment marked with * is absent, score =0 for that assignment.

Year 1	Ethics and medico-legal*	Evidence based medicine* 6.8	Consultation 6.5	FINAL AVERAGE 4.5 (...../10)
Year 2	Quality improvement*	Community orientated primary care*	Additional (optional)	FINAL AVERAGE (...../10)
Year 3	Family orientated primary care*	Teaching and learning	Additional (optional)	FINAL AVERAGE (...../10)
Year 4	Elective assignment	Elective assignment	Additional (optional)	FINAL AVERAGE (...../10)

*Required by CMSA

6. Logbook (section 7): Look at the skills in the **unshaded** blocks (core skills) and add up the total number of "D" ratings. To give a score out of 20 divide the total number by 8 for a 4th year registrar, 6 for a 3rd year registrar, 4 for a 2nd year registrar and 2 for a 1st year registrar. Give the score to the nearest whole number and to a maximum of 20.

Look at the skills in the **shaded** blocks (supervised and elective skills) and add up the total number of both "D" or "C" ratings. To give a score out of 10 divide the total number by 4 for a 4th year registrar, 3 for a 3rd year registrar, 2 for a 2nd year registrar. Do not divide for a 1st year registrar. Give the score to the nearest whole number and to a maximum of 10. Add the two scores together to give a final score out of 30.

Score for unshaded skill blocks (...../20)	11/20	Score for shaded skill blocks (...../10)	4/10	SUM OF TWO SCORES (...../30)	15/30
--	--------------	--	-------------	------------------------------	--------------

7. Section 10: The Program Manager will make a global rating of the portfolio (Also using the reflections on learning in section 3, and a Likert scale.)

SCORE SELECTED (...../10):	8
----------------------------	----------

1 Poor	2 Barely adequate	3 Average	4 Good ✓	5 Excellent
Reflections on allocations ¹ :				
<i>Describes what happened:</i> Only experiences or clinical activities are described.	<i>Describes one's reactions:</i> Writing shows self-awareness in terms of one's thoughts, feelings and context.	<i>Critical analysis of learning:</i> Writing shows critical analysis with development of more abstract conceptualization of new knowledge, skills and personal growth.	<i>Critical analysis of learning and learning needs:</i> Writing also shows critical analysis of what must still be learnt or focused on next.	<i>Critical analysis of learning, learning needs and practical planning:</i> Writing also shows how these new learning needs have been translated into future plans.
1 Poor	2 Barely adequate	3 Average	4 Good ✓	5 Excellent
Organization of portfolio:				
Incomplete or many areas disorganized or filled in mostly at the end of the year.	Complete with a few areas disorganized but completed throughout the year.	Complete and organized in a systematic way. Completed throughout the year.	As before but presented in an exemplary way.	As before but with innovative additional evidence such as photos, videos, patient reports.

*1 Koole et al. BMC Medical Education 2011, 11:104

Year	2017	S. Goldenhuys			
The portfolio is:	Poor	Barely adequate	Average	Good (circled)	Excellent
Portfolio Assessment Tool (PAT) Score 68 / 100				
Recommendations:	Good progress, make observations more authentic. nice material for talks. Well done.				
Signed:	<i>[Signature]</i>				
HOD/Programme manager name:					
Date:	Dec 2017				