

THE PROFESSIONAL SKILLS REVIEW – Guidelines for Completion

1. The PSR is used as a mechanism for the trainee to put forward (and receive feedback on) their abilities to demonstrate the required professional (pervasive) skill capabilities in terms of the CA training model.
2. The initiation of this document (and the recording of evidence therein) is the responsibility of the trainee. One of the pervasive tasks (PA 7) specifically requires that trainees demonstrate their ability to “take responsibility for their own development”. Them driving the assessment process is seen to be a fundamental component of this pervasive task and Training Offices may struggle to sign off on their trainee’s competence in PA7 if their trainees do not initiate these documents by the due dates.
3. Trainees need only complete those sections of the document in respect of professional skills for which they wish to receive formative assessment of their ability to demonstrate.

4. Completion of the PSR by the trainee

4.1. Trainees must create 1 document at the beginning of each new ANA period that covers the next 6 months and then update it (document evidence, and have that reviewed) on an on-going basis but *at least* once during every two month period. This is the minimum requirement and Training Offices may wish to specify a more regular requirement for completion. The more frequently the document is completed, the more frequently a trainee receives feedback on his abilities to demonstrate these skills and thus the greater the opportunity for them to identify their own developmental needs and seek to improve their professional skills. There is also no doubt that the more evidence there is of the trainee’s ability to demonstrate a pervasive competency, the easier it is to evaluate their competence during the ANA

4.2. Professional conduct competencies:

The trainee must record evidence in support of their demonstrated understanding of these competencies. Evidence documented must be POSITIVE, SPECIFIC, and preferably VERIFIABLE. The trainee does not need to perform a self-assessment of these competencies as they will form part of a discussion with the trainee concerning professional conduct during the Assessment Needs Analysis meeting.

4.3. Other professional skill competencies:

The trainee must perform a self-assessment for each of these competencies and indicate the level of competence which they, in their view, were able to demonstrate in respect of the relevant professional skill. Trainees need to document suitable evidence (that is POSITIVE, SPECIFIC, and VERIFIABLE) in support of their assessed level of competence

4.4. Trainees must complete this document *on an on-going basis* with a minimum requirement that the trainee must update the PSR form with at least one recorded example of **BOTH** professional conduct competencies and other professional skills competencies at least once during every two months.

5. Completion of the PSR by the reviewer

5.1. Professional conduct competencies:

The Reviewer needs to consider the acceptability of the evidence (i.e., is it positive, specific, and preferably verifiable) presented by the trainee in these competencies.

The reviewer does not need to rate the examples documented by the trainee but rather needs to perform a "quality control" review of the acceptability of the evidence. They also do not need to conclude on whether the evidence presented actually demonstrates an understanding of the competency as this will be performed by the evaluator during the ANA meeting.

5.2. Other professional skill competencies:

The Reviewer needs to consider the evidence presented by the trainee in these competencies, indicating their opinion as to the level of competence demonstrated by the trainee for the selected competencies.

Where the rating indicated by the trainee is different from the rating of the Reviewer, the Reviewer is expected to add feedback comments to explain the difference in opinion and may wish to meet with the trainee to discuss these differences, if deemed necessary. **Please note that it is the rating of the reviewer that is ultimately transferred to the 6 monthly assessment needs analysis.**

5.3. Competence should be reviewed by the Reviewer timeously after the trainee has completed the form (it is suggested that forms should be reviewed within three weeks from when they are completed by the trainee).