

Pharmacy Trainee Support Guide



September 2021

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1 Introduction

This guide outlines the processes recommended for pharmacy trainees (trainee foundation pharmacists and pre-registration trainee pharmacy technicians) in training placements, commissioned by Health Education England, requiring additional support or adjustments to their training. This is an England-wide core guide which will be adapted where necessary to reflect regional differences.

This guide refers to the 'Educational Supervisor' role for both commissioned training programmes. Please note for trainee foundation pharmacists, this refers to the 'Designated Supervisor' role. Please see [Appendix 1](#) for a glossary of roles referred to throughout this guide.

Across all professions, it is recognised that individuals sometimes encounter challenges during their training for a variety of reasons. The spectrum of issues and concerns encountered can be wide ranging. This guide has been designed to help organisations assist individuals that require additional support during their training programme. For many trainees, this support will only be required for a short time. In other cases, support and/or adjustments to training may be required for the full training period.

Requests from trainees for additional support, advice and/or adjustments should be normalised within the training environment. Employers should ensure this is not associated with stigma or disadvantage. The employing organisation is directly accountable for any issues that trainees may experience, to the extent that the issues are experienced as a direct consequence of employment.

Health Education England (HEE) embraces the social model of disability (and rejects the medical model) so that people with disabilities feel enabled / empowered¹. Please see Appendix 5 'Disability' for more detail, including information on access to DWP Access to Work for adjustments in the workplace. HEE does not employ pharmacy trainees but is responsible for commissioning training and providing a salary contribution to the employer.

Employing organisations are expected to meet the expectations set out in the HEE Quality Framework for education and training. It is understood that HEE Schools support employing organisations in meeting the expectations of the Quality Framework. In this context, this reference guide has been designed to help define the relationship between the employer and HEE in supporting trainees requiring additional support.

Employers may use this guidance to assist with decision making around training and outcomes.

All these processes are part of wider HEE work to implement the HEE Quality Framework. Find out more at www.hee.nhs.uk/our-work/quality. This guide is also relevant to trainees who are working part-time and those who are undertaking a break from training.

This guidance should be considered supportive for Practice Supervisors (PS), Educational Supervisors (ES), Designated Supervisors (DS) and Educational Programme Directors (EPDs), rather than mandate, policy or contract. PS, ES, DS and EPDs are not employed by or agents of HEE. Salary Support payments to employers made by HEE does not result in HEE having a degree of control or influence over a supervisor that could result in an agency or employment relationship arising between HEE and a supervisor at any point.

This reference guide is designed to complement, and should be read in conjunction with, your own local Human Resource and Occupational Health policies. This reference guide does not address issues relating to terms and conditions of employment.

Important points of context:

- The Pearson Review into the health and wellbeing of trainees within the NHS contains several recommendations and we request that all educational supervisors (tutors) are familiar with these. See [NHS Staff and Learners' Mental Wellbeing Commission Report](#) (February 2019).
- Patient safety must be paramount in all circumstances and if a problem or issue arises that might compromise this, it must be raised through the appropriate channels urgently.
- Pharmacist Trainees must pass the GPhC registration assessment at the allocated point in their training period; opportunities for formative assessment should be provided during the training year. The Foundation Year Assessment Strategy for trainee foundation pharmacists outlines work-based assessment tools which may help supervisors to determine a trainee's competence. However, the GPhC assessment and foundation year assessment strategy are separate. The foundation training year is intended to prepare a pre-registrant for practice. HEE has no input into the GPhC pre-registration assessment. Any concerns relating to the trainees' performance in the assessment are out of scope for HEE and should be directed to the GPhC.
- Pre-registration trainee pharmacy technicians must successfully complete a GPhC-accredited course, GPhC-recognised qualification or a GPhC approved apprenticeship pathway to be eligible to register as a pharmacy technician. In addition, a minimum of two years' work-based experience in the UK, Isle of Man or Channel Islands is required. Opportunities for formative assessment should be provided during the training period.
- Health and/or other issues which arise during the training year may need to be declared to the GPhC at the point of registration. Visit GPhC Registration: [Something to Declare](#).
- HEE is committed to Equality, Diversity and Inclusion. All educational supervisors should have training in this area and understand the additional challenges which some trainees may experience during their training. See [HEE Diversity and Inclusion Strategic Framework 2018-2022](#)
- Some trainees may require adjustments to be made to the workplace or their working practices to support them to complete training successfully. Further guidance can be accessed at the NHS employer's website. Adjustments to the workplace are the responsibility of the employing organisation. If trainees require adjustments, they should raise this with their employing organisation in the first instance.

- If you have a specific need which you feel could disadvantage you when sitting the GPhC registration assessment (trainee foundation pharmacists only), you can request a 'reasonable adjustment' to the assessment conditions. This application should be made directly to the [GPhC](#) in advance of the registration assessment application process during the training year.
 - See [Appendix 2](#) for General Principles and Management Pathway.
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1. s.6 of the Equality Act 2010 provides a statutory definition of Disability. The Equality 2010 provides statutory protection for Disabled people not shared by other people, included people from protected characteristic groups. EA 2010 allows disabled people to be put in a better position, also allows for some forms of positive discrimination – but only for those meeting the s.6 definition. The largest % of student complaints to Ombudsman revolve around disability discrimination. Failure to make reasonable adjustments can be a costly legal breach.

2 Identifying a trainee requiring additional support

Across all professions, it is recognised that trainees may sometimes encounter difficulties during their training. The aim of identifying a trainee who requires additional support is not to label them but to put in place supportive processes as early as possible to ensure they are provided with every opportunity to successfully complete their training period.



Key points to facilitate the identification of trainees requiring additional support:

- Employing organisations should be vigilant to potential problems so that they are identified as early as possible.
- Employing organisations have a responsibility to create a supportive environment in which trainees feel able to raise concerns or problems they are encountering.
- Employing organisations have a responsibility to address concerns in a timely manner and develop action plans where appropriate (which should be documented).
- Trainees should feel able to discuss the merits or otherwise of their training experience and identify factors that may be inhibiting their progress.
- Trainees have a responsibility to report any problems as soon as they become aware of them.
- Regular feedback should be provided by ES regarding progress in training as part of educational review meetings.

A trainee requiring additional support may be identified in the following ways:

- Application for employment which highlights a disability¹
- Trainee requesting support directly
- Concerns raised around performance from colleagues/peers
- Through regular professional and performance appraisals

¹ National Recruitment (ORIEL) applications forms have a section inviting applicants to indicate their disabilities and any required reasonable adjustments interviews and assessments as part of the recruitment scheme. HEE regional teams do not routinely have access to trainees' application forms as they are passed directly to employing organisations. Adjustments requested on National Recruitment application forms are requested for recruitment process purposes. If a trainee requires adjustments to the workplace and/or training, the trainee should raise this with the employing organisation as early as possible. Employers should ensure they have reviewed application forms and discussed any potential adjustments with prospective trainees to ensure appropriate support and adjustments are put in place at the earliest opportunity for trainees with disabilities. Advice may be sought from HEE to support adjustments to the structure of the training programme, such as amendments to working hours and/or training duration.

- Performance in assessments
- Clinical governance frameworks (including reporting of serious incidents or complaints)
- Clinical audit activities
- Absence from work or not fulfilling contracted hours of employment

Issues may arise in the following areas:

- Trainee performance or capability
- Attitude and behaviour
- Health
- Work environment
- Life events

If a trainee is identified as requiring additional support, it is important that any concerns are discussed with the trainee and documented (see [Section 2.3](#) for guidance on documentation and information governance) at the earliest opportunity. If the ES is unsure whether their trainee requires additional support, they should refer to the Classification [Matrix](#) and discuss further with the EPD.

For ES who are new to the role it is important to involve an experienced colleague early to assist in identifying and exploring underlying factors. Regular review meetings with the trainee, feedback from practice supervisors, rotation leads, and colleagues allow potential issues to be identified or concerns raised. Anecdotal evidence has shown that early intervention allows individuals to be provided with extra support to complete the remainder of their programme successfully. The ES has an integral role in identifying and recognising any early issues.

Early identification and proportionate intervention at a local level is crucial and can prevent issues becoming difficult to resolve

The ES and trainee have a joint responsibility to address and resolve any challenges or issues as they arise, rather than waiting for their next scheduled meeting. Discussions of areas of concern should also be incorporated into regular progress reviews, appraisals and meetings. These should be conducted as a two-way effective professional conversation. Trainees are responsible for listening to any concerns raised taking the agreed action within agreed timescales. If there are concerns about a trainee's performance based on the available evidence, the next step is to consider what the underlying issue/s might be, and to explore the context in which these problems are occurring.

2.1 Initial meeting with identified Trainee Requiring Additional Support

If there are concerns about any trainee identified by persons other than the ES, the trainee's ES should be informed and involved in the first instance. The ES should then arrange to meet with the trainee to explore the concerns as soon as possible. It is important that any evidence presented to the trainee is documented accurately and fully objective in nature.

Where possible collate evidence from a variety of sources. As part of this initial meeting, the ES and trainee should consider whether a particular incident is a one-off that can be easily remedied, or part of a series of events. Full documentation and evidence of any repeated events should be provided to the trainee. See [Section 3](#) for guidance on documentation and information governance.

The Classification [Matrix](#) is intended to support the ES and trainee to categorise the area(s) of concern and to ensure that the correct level of support is offered.

The EPD, if different to the ES, should also be involved in any case from the outset to provide support, advice and guidance to both parties.

2.2 Categorisation of concerns

The classification [matrix](#) provides further detail around areas of concern and the thresholds for escalation. This matrix is designed to support the ES to identify concerns of greater significance and higher urgency, both at the point concerns are identified and at ongoing progress reviews. This is to support escalation through local 'in-house' support mechanisms.

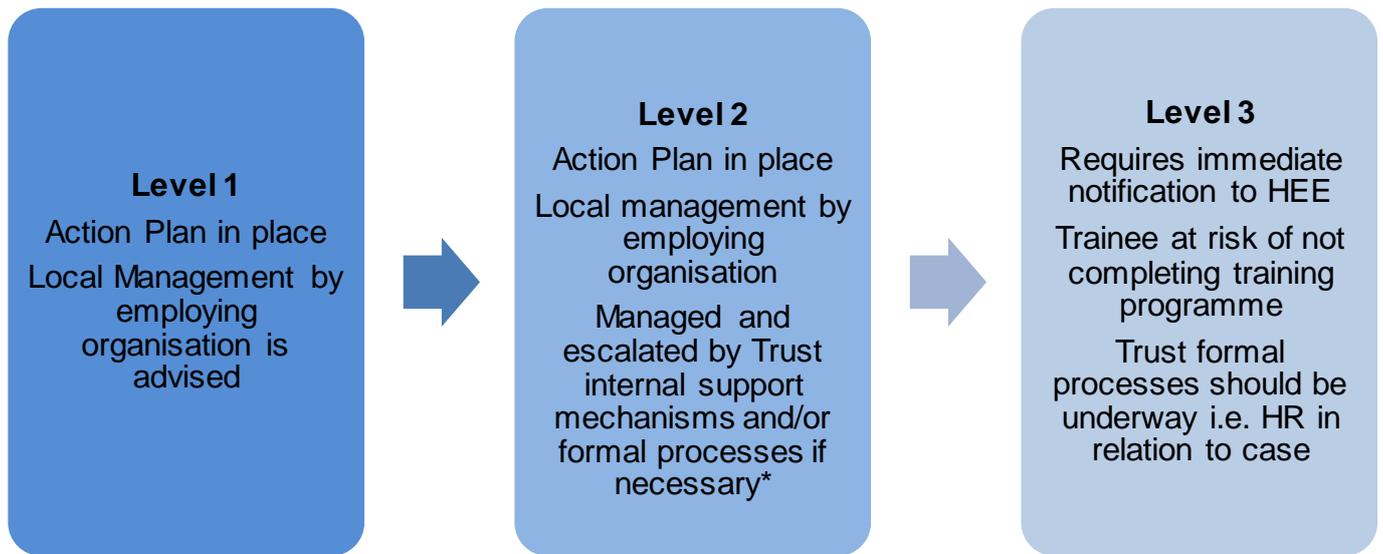
It is also important to recognise that different problems require different approaches – for example, *health versus professional*.

Employers internal support mechanisms should be consulted according to the issue that has arisen:

- **Occupational Health:** offer advice on absence management, sickness management and rehabilitation, risk assessments, health surveillance, workplace immunisations and health promotion and wellbeing.
- **Human Resources:** offer advice on managing performance, disciplinary proceedings, absences (planned/unplanned).
- **Increased monitoring** to review progress.
- **Further assessments** such as calculations, accuracy/competency logs to improve practice.

All trainees requiring additional support should be allocated a rating Level 1, 2 or 3 to ensure appropriate management. Further information on how cases are reported to HEE, and processed, is detailed in Section 3. Please see [Appendix 3](#) for the management pathway flowchart.

Categorisation of concerns:



*For Level 2, local management by employing organisation is advised unless there are concerns about programme completion or significant issues risking the integrity/quality of the trainee's placement (such as relationship breakdown) in which case HEE involvement is indicated and should be secured

2.3 Documentation and Action Planning

At the initial meeting with the trainee, the ES, EPD and trainee should complete a Trainee Progress Review Record ([Form A, Appendix 7](#)) and create an action plan ([Form B, Appendix 8](#)). This action plan should:

- be clear and unambiguous
- be agreed by all parties
- have specific, defined, and achievable actions
- contain action deadlines, review dates and clear consequences of not achieving the actions
- ensure follow up meetings allow for further evolution of subsequent action plans.

The action plan is a working document between the ES and their trainee that will be revisited and updated as actions are completed over time. It is important that both the trainee and the ES sign the action plan when it is created, updated and reviewed. The ES should communicate the agreed objectives to the trainee and key individuals involved with the individual's training (for example, the rotation lead). [Appendix 5](#) contains more information about possible courses of action and support.

For many, this action plan will only be required for a short time frame, to help address any concerns or issues, and once resolved successfully the trainees requiring additional support classification will no longer apply. If the problem reoccurs or new issues arise, the process can be applied for each new concern.

During the initial meeting, trainees are responsible for listening, raising concerns or issues promptly and taking the agreed action within the set deadlines. This meeting and the subsequent action plan should be documented, signed and a copy held by both the ES and the trainee. This may be kept in the trainee's educational portfolio. All further documentation and action planning should be accurately recorded and retained. The frequency of the reviews and follow-up meetings is determined by the individual case and level of support required.

If concerns persist, a follow up meeting should be arranged to review the action plan and within the follow-up meeting, the ES should outline the possible future courses of action. The ES should seek further advice from the EPD and if necessary, escalate to the Chief Pharmacist, Human Resources, Occupational Health or other appropriate department.

This should not be left until deadlines for competency sign-off

Documentation and its storage should comply with the employer's Information Governance (IG) policies and procedures and not be transferred to any third party (including HEE) without the demonstrable consent of the trainee. It is important that the ES and EPD understand their responsibilities in this area.

See also [Section 3.3](#) regarding ongoing documentation.

2.4 Individual self-identifying as a trainee requiring additional support

Any trainee who feels that they require additional support with their training should seek support from their ES in the first instance. Together both parties should utilise this document to identify the trainee's personal area/s of concern and identify appropriate support mechanisms to be built into a tailored action plan.

It is advised that trainees seek advice within their employing organisations when needing additional support. However, advice and support can also be sought from HEE if they are unhappy with their employing organisations' resolution or action via the online reporting form (Appendix 6).

Trainees can raise concerns with HEE via the online reporting form if employing organisations are not accommodating reasonable adjustments that ought to be in place to support a trainee with a disability. HEE does not determine the initial education and training standards for pharmacist or pharmacy technician training or approve training plans. In the event of adjustments needed to training plans due to disability, advice should be sought from GPhC in

their role as the regulator who sets these standards. It is not within HEE's remit to alter or amend an existing training plan, or to unilaterally put in place a new training plan.

Any trainee that has concerns about malpractice, wrongdoing, or fraud within their employing organisation can also call the whistleblowing helpline for specialist signposting, advice and guidance.

HEE is a prescribed body for purposes of the legislation, so trainees can raise concerns to HEE and expect statutory protection. For more information visit: [HEE's Whistleblowing \(Protected Disclosure\) Policy](#) or refer to your organisation whistleblowing policy and [Raising Concerns Policy Guidance For the NHS](#).

2.5 Failure-to-disclose issues which may affect training

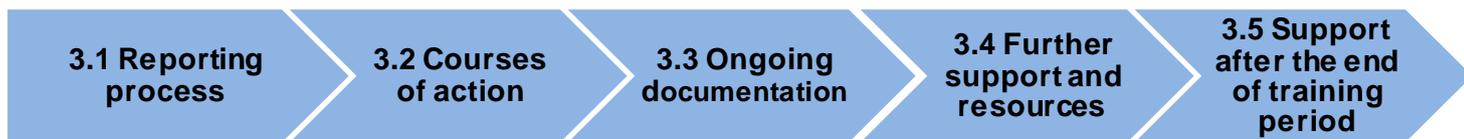
The GPhC outline the requirements of pharmacy professionals including those applying to join the foundation training scheme here: [Something to declare](#).

Trainees are encouraged to discuss issues which may affect their training so that appropriate support and adjustments can be put in place. The GPhC advise:

'Declaring a health condition that could affect your ability to practise safely is an opportunity for you to tell us how you manage your condition. It also allows you to show that you have insight into any limits you may need to put on yourself, and adjustments you may need to make, for you to practise your profession safely and effectively. Your registration will only be at risk if, on the evidence we have, it is not clear to us that your practice will be in line with the necessary standards of conduct, ethics and performance.'

If a trainee fails to disclose an issue which may affect training or engage in discussions around the amendments to training and support that they may require, advice should be sought from the GPhC.

3 Reporting and management



3.1 Reporting to HEE

HEE as the commissioner of training is limited to providing support or guidance in the following areas:

- Signposting to additional support and guidance and ensuring all options have been explored
- Advice regarding action planning
- Advice regarding extensions or amendments to the training period, including requests for part time working or breaks in training.

[The Classification Matrix \(Appendix 4\)](#) should be referred to for guidance regarding reporting and categorisation.

Depending on the categorisation of the case the following action should be undertaken:

Level 1	Level 2	Level 3
<ul style="list-style-type: none">• Complete and retain action plans• HEE does not need to be notified*	<ul style="list-style-type: none">• Complete and retain action plans• Escalate within the employing organisation• HEE does not need to be notified*• Local management by placement employing organisations is advised unless there are concerns about programme completion or significant issues risking the integrity/quality of the trainee's placement (such as relationship breakdown) in which case HEE involvement is indicated and should be secured	<ul style="list-style-type: none">• Report to HEE• Ensure escalated within the employing organisation

***Note:** although HEE does not need to be notified at Level 1 and 2, support can be sought at these earlier stages if it is felt to be necessary or in cases where less than full time working, or other amendments are required from the beginning of the training period. HEE involvement should also be secured if there are concerns about programme completion or significant issues risking the integrity/quality of the trainee's placement (such as relationship breakdown).

Issues can only be reported to HEE with the consent of the trainee – see below:

How to report to HEE:

- Please refer to Appendix 6 for details on how to report to HEE.
- To seek the support and/or active involvement of HEE in any situation where a trainee requires additional support **demonstrable consent** must be obtained from the trainee.
- The GDPR defines the consent of the data subject as: *'any freely given, specific, informed and unambiguous indication of the data subject's wishes by which he or she, by a statement or by a clear affirmative action, signifies agreement to the processing of personal data relating to him or her.'*
- 'Clear affirmative action:' Consent must be given through a clear affirmative act that reflects the willingness to accept the processing of personal data.
- Consent should be obtained from the trainee using the form in [Appendix 6](#). This should be retained at the training site.

When obtaining consent from the trainee, it should be explained to them that as HEE is neither the regulatory body nor the employer, HEE's involvement is to ensure that all support and adaptations have been put in place to maximise the likelihood of a successful outcome to training.

If consent is not obtained from the trainee, contact can only be made with HEE which does not disclose any personally identifiable information. In the event of a serious issue to include patient safety advice should be sought from the employer's HR department and the GPhC as regulator.

3.2 Possible courses of action and support

If a trainee has been identified as a trainee requiring additional support the ES and trainee should develop an action plan to support the issue/s identified. Management is determined by the type of issue, where the approach is tailored to the individual. It is recognised particularly in health-related issues, that further specialist advice such as GP, OH will need to be sought.

[Appendix 5](#) provides examples of commonly encountered issues for trainees across healthcare and sets out possible courses of action and support in each example. The list of suggestions is not exhaustive and is designed to be used to guide the development of issue appropriate SMART objectives.

HEE also expects that the ES/trainee will liaise with the following parties, as appropriate, in identifying courses of action and support:

- EPD
- Peer mentor
- Local pharmacy programme groups
- Human Resources Department (Trust)
- Occupational Health (Trust)
- The General Pharmaceutical Council
- Higher Educational Institutes or underpinning knowledge provider
- UK Border Agency.

3.3 Ongoing documentation

Accurate and prompt documentation minimises disagreement about the facts, and results in an audit trail that can help relate future problems to past patterns of performance or behaviour.

Accurate documentation also reduces the scope for future challenge especially if decisions result in a lack of competency sign-off at the end of the educational programme. **All documentation must comply with the requirements of the Data Protection, GDPR and Freedom of Information Acts in relation to processing, retention and security of records.**

Supervisors and employers should be aware that any documentation (be that, for example, appraisal documentation, meeting notes, emails or call records) relating to instances where learners require or signal a need for additional support need to be carefully recorded (with joint agreement between both parties where appropriate), timed, dated and filed. This is to ensure that all parties are able to confidently produce documents and evidence where required, as part of any regulatory or legal proceedings which might follow. This is of the utmost importance in protecting the interests of all parties.

Records of conversations should be held confidentially with the knowledge and consent of both the trainee and the person who has conducted the assessment of the issue. **Storage (including the length of time the documentation is stored) should be in line with the employing organisation's Information Governance policies and procedures.**

The trainee should be given a copy of any documentation relating to them and encouraged to keep such copies in their records or portfolio for discussion at meetings. **Trainees should be made aware of where the information about them will be stored and who will have access to it.**

3.3.1 Trainees who work at multiple sites or with second employing organisations during their training period

There may be trainees who have multi-sector placements, with two or more employers, or work across different sites for one employer. The transition to different placements can prompt new, pre-existing or resolved issues in trainees. Trainee consent should be sought prior to sharing any information. This is of particular significance with respect to health-related, or personal issues, where disclosure may be of a confidential or sensitive nature. To ensure the trainee is fully aware of the information about them that is shared it is advised that when moving to a new sector, or site, a meeting is held between the trainee and the ES at each site to ensure that all support and/or adjustments are in place. Information should only be provided to other employers or supervisors if the trainee has provided consent for this to be done.

3.4 Further support and resources

The following resources may be considered when managing cases. Some resources require self-referral by the trainee, others provide the ES or EPD with support and advice for specific issues:

Local Employing Trusts Policies and Procedures and support: Organisations will have policies and guidance for various management issues. These should be consulted depending on the issue. Each employer will also have access to Chaplaincy Services and health and wellbeing / counselling support.

Occupational Health (OH):

- Occupational health is a specialist branch of medicine focusing on the health of staff in the workplace. OH professionals aim to find out what impact work has on staff health and make sure that staff are fit to undertake the role they are employed to do both physically and emotionally.
- OH specialists offer advice on absence management, sickness management and rehabilitation, risk assessments, health surveillance and prevention, workplace immunisations and health promotion and wellbeing.

Human Resources (HR): Human resources staff deal with all issues relating to the employment of staff, both clinical and non-clinical. HR specialists offer advice and support to line managers on managing performance, disciplinary proceedings and absences (planned/unplanned).

General Practitioners: Individuals facing evolving health concerns should contact their registered GP for further medical management or appropriate referral where required.

Trust Director of Medical Education: May be able to help or advise with case management to draw parallels between medical and pharmacy trainees.

Chief Pharmacists: Organisation chief pharmacist should be consulted in cases that require formal interventions.

[General Pharmaceutical Council](#): Any fitness to practice concerns regarding patient safety should be referred to the General Pharmaceutical Council.

[Pharmacist Support \(foundation trainee pharmacists only\)](#): Pharmacist Support is an independent support charity for the profession which is able to provide individual support to pharmacy trainees.

Please consult [Appendix 5](#) for further resources on how to manage specific concerns or issues.

3.5 Support after the end of the commissioned training period

With regards to supporting students who require more than 52 weeks (for foundation trainee pharmacists) or 2 years (for pre-registration pharmacy technicians) to complete their training, HEE regional pharmacy teams will attempt to put the following support in place:

- Attempts will be made to secure additional funding to extend training if the trainee is in a HEE commissioned training place, at present this can only be done on an **ad-hoc basis and cannot be guaranteed**
- If the supplementary training the trainee has undertaken is funded by HEE, this support will be continued beyond the 52 weeks to the next sitting of the registration assessment (for foundation trainee pharmacists)
- Due to current funding models, financial support for further training is not available for foundation trainee pharmacists, who have been unsuccessful after two attempts at the registration assessment. An additional 6 months of training is no longer considered required by the GPhC between the second and third sitting, if the trainee or ES felt additional training would be beneficial, the HEE team and the GPhC can be contacted for advice and support in this situation.

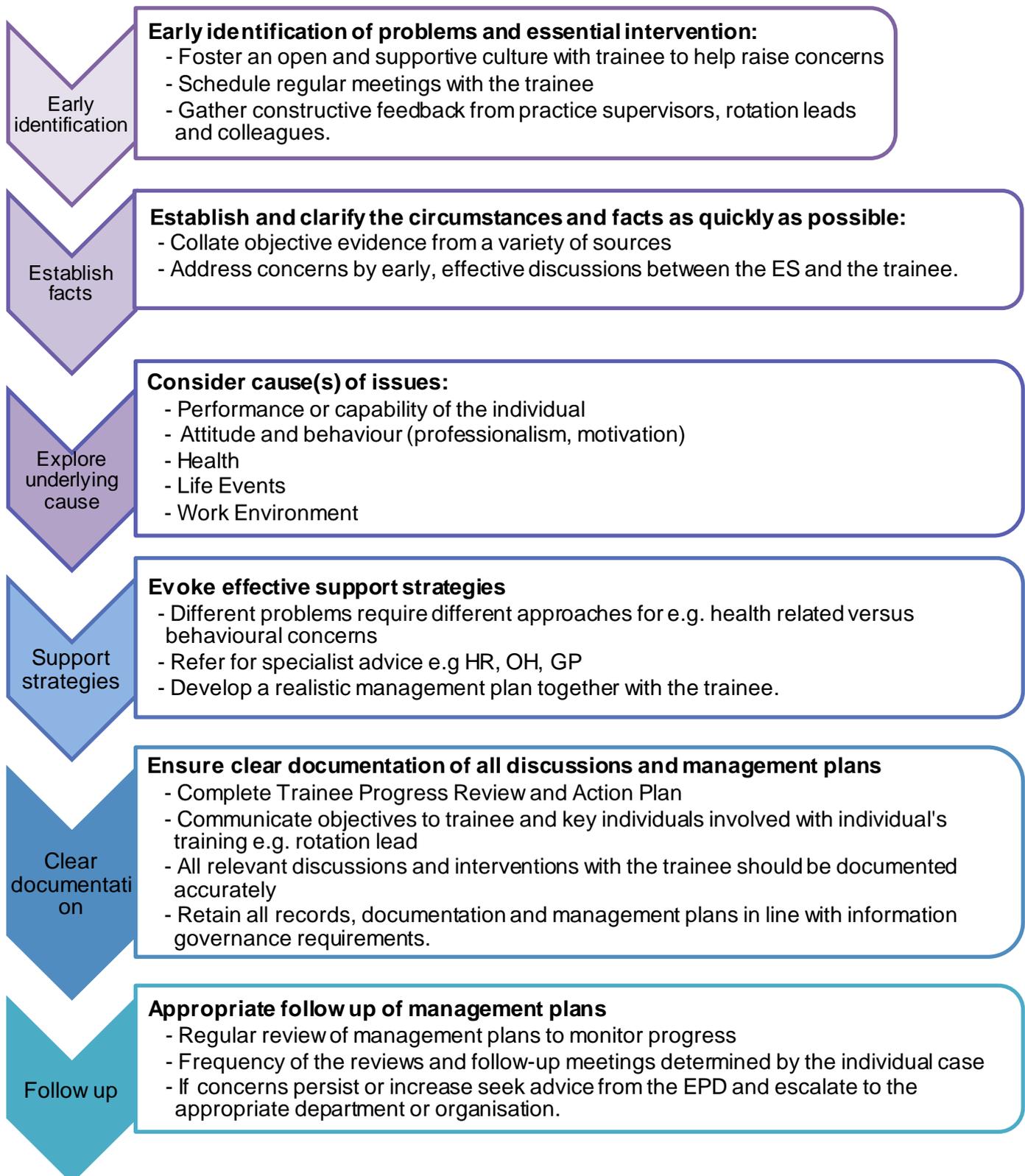
Appendix 1: Glossary

Term/Acronym	Definition
TFP	<p>Trainee foundation pharmacist</p> <p>Undergoing a 52-week placement under the supervision of an educational supervisor (tutor) in an approved training site, developing their practice to meet a range of learning outcomes. Their progress is guided by and verified by their ES. Foundation trainee pharmacists must also pass the GPhC registration assessment.</p>
PTPT	<p>Pre-registration trainee pharmacy technician</p> <p>Pre-registration trainee pharmacy technicians (PTPTs) are trained within the workplace and complete a 2-year GPhC-approved integrated competency and knowledge-based qualification/course. This can be achieved by undertaking GPhC-accredited courses, GPhC-recognised qualifications or a GPhC approved apprenticeship pathway, which will enable registration as a Pharmacy Technician with the GPhC.</p>
ES	<p>Educational Supervisor</p> <p>An “Educational supervisor” in pharmacy is someone who is selected and appropriately trained to be responsible for the overall supervision and management of a specified trainee’s educational progress during a period of training placement or series of placements. The educational supervisor is responsible for the trainee’s Educational Agreement. This will include formal assessment and sign off.</p> <p>The educational supervisor should have an understanding of the range of learning, assessment and support opportunities for learning in the workplace, work collaboratively with colleagues to monitor and support learner's progression and foster learner autonomy. They should also be able to identify and support trainees in difficulty, including interfacing with employment performance management procedures. An ‘Educational supervisor’ role involves</p>

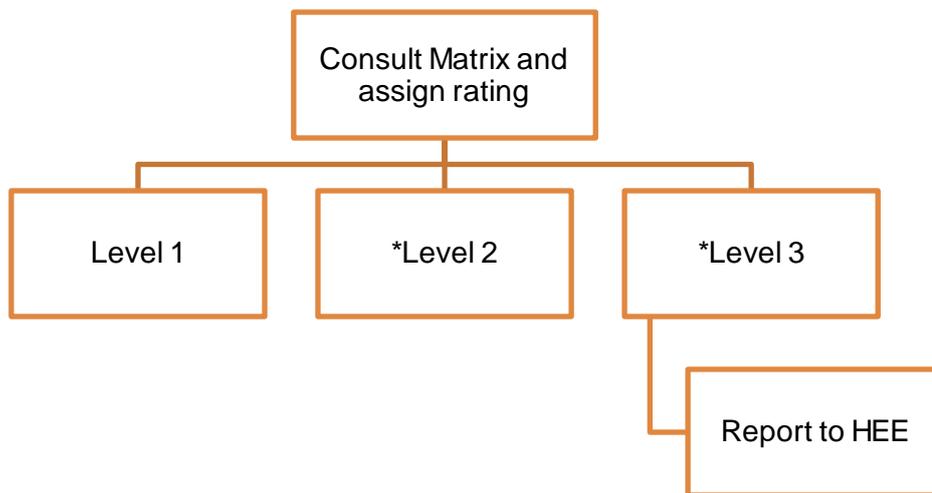
Term/Acronym	Definition
	<p>overall supervision and management of a specified trainee’s educational progress during a programme (or series of periods of training), as opposed to a single period of training.</p> <p>https://www.lasepharmacy.hee.nhs.uk/dyn/_assets/_folder4/educational-frameworks/heelaseesframework2019.pdf</p> <p><i>Educational supervisors are not employed by or agents of HEE, they are employed by local employers.</i></p> <p>Salary Support payments to employers made by HEE does not result in HEE having a degree of control or influence over a supervisor that could result in an agency or employment relationship arising between HEE and an educational supervisor at any point.</p>
PS	<p>Practice Supervisor</p> <p>A “Practice supervisor” in pharmacy is someone who is selected, appropriately trained and responsible for overseeing a specified trainee’s work and providing developmental feedback during a period of training. This role requires appropriate assessment skills. Practice supervisors will support learners to identify opportunities for learning in the workplace and provide supervision of trainees on a day-to- day basis, identifying trainees requiring additional support. Practice supervisors are involved in and contribute to a work-based learning culture.</p> <p>“Practice supervision” in pharmacy relates to day-to-day responsibility for trainees in the workplace. Roles include being available in the clinical or practice environment to provide direction and support, discuss problems, teaching and facilitation on-the-job with developmental conversations and regular developmental feedback.</p> <p>https://www.lasepharmacy.hee.nhs.uk/dyn/_assets/_folder4/educational-frameworks/heelasepsframework2019.pdf</p> <p><i>Practice supervisors are not employed by or agents of HEE, they are employed by local employers.</i></p> <p>Salary Support payments to employers made by HEE does not result in HEE having a degree of control or influence over a supervisor that could result in an agency or employment relationship arising between HEE and a practice supervisor at any point.</p>

Term/Acronym	Definition
EPD	<p data-bbox="421 201 891 228">Education Programme Director</p> <p data-bbox="421 288 2078 616">An “Educational programme director” in pharmacy (EPD) oversees one or more entire training programmes locally, regionally, or both, developing and implementing programmes together with external bodies and local teams. An individual may be the EPD for more than one programme. The EPD ensures that quality criteria are met, including resource, appropriately trained supervisors, possibly selection of candidates, monitoring of progress and equal opportunities. We recommend that consideration be given to the EPD being a member of the local Senior Pharmacy team where appropriate. A specialist Education and Training practitioner employed by an organisation may act as the overarching co-ordinator for all of these (much like a Director of Medical Education ‘DME’ in medicine) For foundation trainee pharmacists, this role was traditionally called the ‘pre-reg manager’.</p> <p data-bbox="421 628 1984 655"><i>Education Programme Directors are not employed by or agents of HEE, they are employed by local employers.</i></p> <p data-bbox="421 711 2051 826">Salary Support payments to employers made by HEE does not result in HEE having a degree of control or influence over a supervisor that could result in an agency or employment relationship arising between HEE and an Education Programme Director at any point.</p>
TPD	<p data-bbox="421 882 864 909">Training Programme Director</p> <p data-bbox="421 970 1928 1043">Training Programme Director (TPD) refers to staff at HEE who are responsible for co-ordinating the training programme across the region.</p>

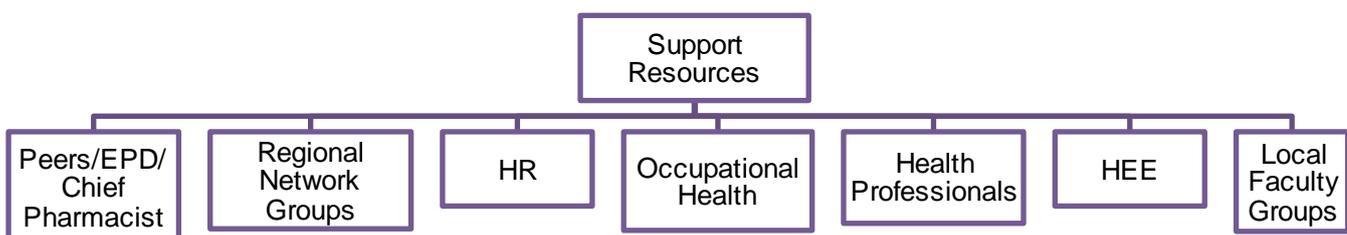
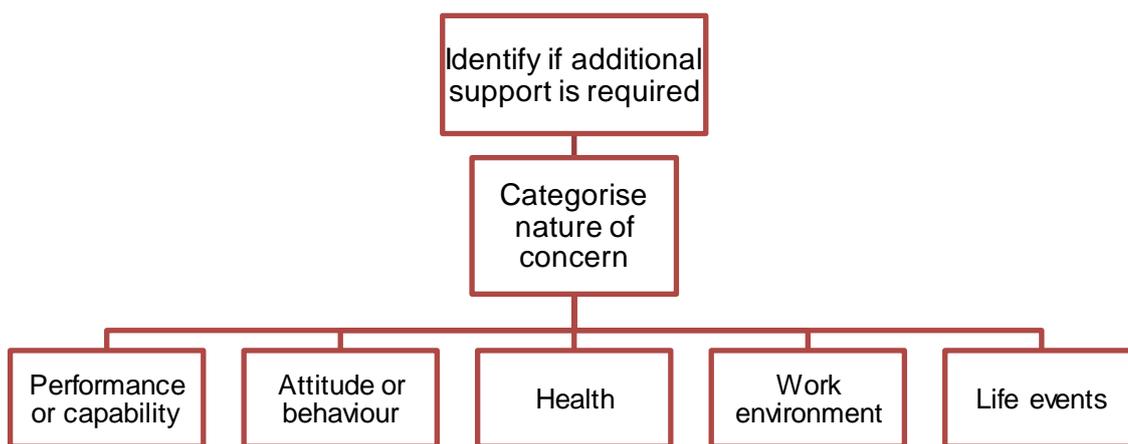
Appendix 2: General principles and management pathway



Appendix 3: Management pathway: identification, categorisation, and support



*HEE involvement should be secured if there are concerns about programme completion or significant issues risking the integrity/quality of the trainee's placement (such as relationship breakdown)



Appendix 4: Classification Matrix for trainee foundation pharmacists (TFP) and pre-registration pharmacy technicians (PTPT)

The matrix overleaf is intended to assist Educational Supervisors and Educational Programme Directors in classifying cases, to determine which ones should be dealt with appropriately without escalation to HEE, utilising guidance within this document and which ones require escalation to HEE for guidance and advice from the start. The table contents are not exhaustive; however, they cover common issues that arise.

HEE should be notified when a case has been classified as Level 3 thereby indicating that there are issues that may impact on the competency sign-off process for the trainee and/or completion of the educational programme within the commissioned timescale or where there are significant concerns about patient safety. It is recognised that in complex situations classified as Level 3, guidance on the management of the case from HEE will be helpful to organisations where internal mechanisms have not led to improvements. Where this occurs, HEE will provide advice to organisations on the management of the case.

It is beyond the scope of this document to provide guidance on how to manage any probity, patient safety or fitness to practice issues. Any concerns of this nature should be referred to the [GPhC](#) as the regulator.

If a Level 1 or 2 case escalates to 3 due to an organisation's internal mechanisms failing to lead to improvements, HEE should be notified.

Level 1:

- Suitable for management by employer's internal support mechanisms
- Support plan in place
- Documentation should be kept
- HEE does **not** need to be informed unless there are concerns about programme completion or significant issues risking the integrity/quality of the trainee's placement (such as relationship breakdown).

Level 2:

- Suitable for management by employer’s internal support mechanisms
- Escalation via employer’s HR policies/processes if appropriate
- Support plan in place and documentation should be kept
- HEE does **not** need to be informed unless there are concerns about programme completion or significant issues risking the integrity/quality of the trainee’s placement (such as relationship breakdown).

Level 3:

- Trainee at risk of not completing training programme within the standard time frame
- Competency sign off process impacted upon
- Management by employer’s internal support mechanisms failed to lead to improvements/ trainee hit trigger point (see matrix) / issue classified as Level 3 from the outset
- Case to be escalated to HEE for advice, guidance, and possible intervention
- Employer’s HR policies/processes underway if appropriate.

Area of concern	Level 1 Refer to criteria above	Level 2 Refer to criteria above	Level 3 Refer to criteria above Trainee at risk of not completing training programme
Performance or capability impacting progression in training	<ul style="list-style-type: none"> • Failure to demonstrate sufficient competence in work-based assessments, time/workload management and basic organisational skills • Consistent low standard of work, for example, frequent mistakes • Performing adequately at one level but not demonstrating capability to advance to a higher level with more 	<ul style="list-style-type: none"> • Repeated, persistent failure to demonstrate sufficient competence in work-based assessments, time/workload management and basic organisational skills • Trainee fails to follow SOPs causing safety/quality issue which risks an unfavourable outcome • Trust capability investigations initiated 	<ul style="list-style-type: none"> • Investigated serious incidents/never events • Escalation of trust capability/conduct investigations • Specific concerns which may require external remediation e.g., trainee wishes to withdraw from programme • Escalation of a performance or capability concern previously classified as Level 2

Area of concern	Level 1 Refer to criteria above	Level 2 Refer to criteria above	Level 3 Refer to criteria above Trainee at risk of not completing training programme
	<p>complex decision making, leadership skills and multi-tasking.</p> <ul style="list-style-type: none"> • Trainee unaware of limitations of role and unfamiliar with local Standard Operating Procedures (SOPs) • Basic skill development issues requiring adaption of educational plan e.g., inability to follow tasks or instructions through • Failure to successfully meet expected programme milestones/ benchmarks/ appraisals/ progress reviews • Low level persistent investigated incidents/never events <p>PTPT only: several college assignments requiring resubmission</p>	<ul style="list-style-type: none"> • Escalation of a performance or capability concern originally classified as Level 1 <p>TFP only:</p> <ul style="list-style-type: none"> • Unsuccessful 13-week GPhC progress review • <i>Other performance or capability issues which are likely to lead to an unfavourable outcome in GPhC progress review, learning outcomes, timely completion of programme or registration assessment attainment</i> <p>PTPT only:</p> <ul style="list-style-type: none"> • High resubmission rate for college assignments • Continued failure to meet course/qualification deadlines or progression milestones • <i>Other issues which risk an unfavourable outcome of the PTPT training programme or failure to complete within deadline</i> 	<p>TFP only:</p> <ul style="list-style-type: none"> • Unsuccessful 26 week and/or 39-week GPhC progress reviews; requests for training extension <p>PTPT only:</p> <ul style="list-style-type: none"> • Trainee's progression or other issues now likely to lead to an unfavourable outcome in PTPT training course/qualification completion or registration • Not expected to meet the Year 1 progression benchmark (this will vary depending on provider but is usually based on successful completion of all Year 1 assignments).
<p>Attitude or Behaviour impacting progression in training</p>	<ul style="list-style-type: none"> • Low level persistent issues, for example challenges with: <ul style="list-style-type: none"> ○ ineffective team working ○ attitude with patients, colleagues, staff, and families ○ rapport with patients, staff, and families 	<ul style="list-style-type: none"> • Trust conduct investigations initiated • Trainee continues to demonstrate issues identified regarding maintaining trust and professionalism • Persistent significant issues, for example challenges with: 	<ul style="list-style-type: none"> • Specific concerns which may need assessment, or remediation • Trust conduct/disciplinary findings • Fraud • Persistent serious issues, for example challenges with: <ul style="list-style-type: none"> ○ ineffective team working

Area of concern	Level 1 Refer to criteria above	Level 2 Refer to criteria above	Level 3 Refer to criteria above Trainee at risk of not completing training programme
	<ul style="list-style-type: none"> ○ respect for people holding different views ○ motivation ○ inappropriate remarks or comments ● Recognised lack of self-awareness and insight – acting outside of the level of competence or not acting at all ● Issues identified regarding maintaining trust and professionalism 	<ul style="list-style-type: none"> ○ ineffective team working ○ attitude with patients, colleagues, staff, and families ○ rapport with patients, staff, and families ○ respect for people holding different views ○ motivation ○ inappropriate remarks or comments ● Recognised lack of self-awareness and insight with limited improvement ● Communication/teamwork issue which risks an unfavourable outcome in programme completion or registration ● Escalation of an attitude or behaviour concern originally classified as Level 1 	<ul style="list-style-type: none"> ○ attitude with patients, colleagues, staff, and families ○ rapport with patients, staff, and families ○ respect for people holding different views ○ motivation ○ inappropriate remarks or comments ● Significant lack of self-awareness and insight ● Escalation of an attitude or behaviour concern previously classified as Level 2
Health impacting progression in training	<ul style="list-style-type: none"> ● Low level mental or physical health concern which is unlikely to affect progression ● Health issues that may impact upon training ● Challenges with a return to work schedule 	<ul style="list-style-type: none"> ● Persistent significant mental or physical health concern which puts programme completion at risk ● Sickness absence in breach of programme, qualification/course or registration limitations ● Health condition which prevents carrying out core duties ● Escalation of a health concern originally classified as Level 1 	<ul style="list-style-type: none"> ● Persistent serious mental or physical health concern ● Illness compromising ability to carry out duties ● Health issues which may require change in programme/post ● Planned prolonged health related absence ● Extent of absence is jeopardising achievement of requisite number of

Area of concern	Level 1 Refer to criteria above	Level 2 Refer to criteria above	Level 3 Refer to criteria above Trainee at risk of not completing training programme
		<ul style="list-style-type: none"> If there are issues that may impact upon competency sign-off process for the trainee and/or completion of the educational programme within the commissioned timescale these should be escalated to Level 3 <i>TFP only: Sickness absence that requires GPhC notification (5 days or longer)</i> 	<p>days of practice required for registration or training programme completion</p> <ul style="list-style-type: none"> Requests for training extension on health grounds Escalation of a health concern previously classified as Level 2 <i>TFP only: Exceeding 40-day GPhC absence limit</i>
Work Environment impacting progression in training	<ul style="list-style-type: none"> Trainee allegations in the workplace such as undermining, bullying, harassment and/or discrimination, lack of resources to perform job/role, unrealistic workload, level of supervision not congruent with level of expertise expected, poor management or support from pharmacy team Trainee has needs that require the content/structure of their educational plan to be substantially adapted e.g., amendment to working hours required Change of tutor (educational supervisor) Mismatches between trainee and educational/practice supervisor 	<ul style="list-style-type: none"> Escalation of a work environment concern originally classified as Level 1 	<ul style="list-style-type: none"> Relationship between trainee and educational and/ or practice supervisor and/or employing organisation has broken down Proven allegations of undermining, bullying or harassment of a trainee Specific concerns which may need assessment or remediation between trainee and employer Any formal trust HR process triggered in relation to the working environment Escalation of a work environment concern previously classified as Level 2
Life Events impacting progression in training	<ul style="list-style-type: none"> Family/personal issues Family expectations outside of work Low level financial issues Victim/witness of crime 	<ul style="list-style-type: none"> Significant family/ personal issues Escalation of a life event originally classified as Level 1 	<ul style="list-style-type: none"> Serious family/ personal issues Having more than one job Prolonged planned absence Escalation of a life event previously classified as Level 2

Area of concern	Level 1 Refer to criteria above	Level 2 Refer to criteria above	Level 3 Refer to criteria above Trainee at risk of not completing training programme
			<ul style="list-style-type: none"> <li data-bbox="1639 272 2224 424">• <i>TFP only: Exceeding 40-day GPhC absence limit</i>

Appendix 5: Management framework of trainee issues and recommended courses of action and support

The table below provides examples of commonly encountered situations where a trainee may require additional support and sets out possible courses of action in each example. This list of suggestions is not exhaustive and is designed to be used to guide decisions around support options for trainees.

Please note that issues relating to misconduct are not covered in this guide, in such cases advice should be sought from the regulatory body. Issues affecting **patient safety** should be escalated appropriately within the employing organisation and with the professional regulator as appropriate.

General support available for a range of issues:

- [Listening Friends Helpline](#)
- [Pharmacist Support Fact Sheets](#)
- [Our NHS People](#)

Area Requiring Support	Possible course of action and support
<p>Assessment/examination performance:</p> <ul style="list-style-type: none"> • Challenges experienced in achieving learning outcomes • Trainee not meeting programme progress benchmarks 	<p>Educational intervention with more supervision. Targeted or repeated training interventions with clear educational objectives. Clearly identified and documented action using the action plan in appendix 8 should be taken wherever possible. This should be implemented prior to invoking formal measures to address capability and performance in employment. For example, regular supportive meetings with supervisor and trainee with action plan and review of SMART objectives; reflection on areas to support development; planned assessments; changes to educational/training plan; review meetings with second supervisor or experienced members of the team.</p>

Area Requiring Support	Possible course of action and support
	<p>Additional resources:</p> <p>Goal setting</p> <p>Your pre-registration (foundation) year</p> <p>Assertiveness guide</p> <p>RPS Pre-Reg podcasts</p> <p>VARK questionnaire to identify learning style/preferences</p> <p>Wellbeing Service</p>
<p>Generic professional development:</p> <ul style="list-style-type: none"> • Communication issues with patients, staff and/or colleagues • Challenges relating to teamworking • Time management and/or basic organisational skills 	<p>Identify underlying issues with care and sensitivity. A mentor, coach or role model may be required. Sometimes professional development issues are a result of a lack of awareness or training need. Consider work shadowing, support, training, planning of assessments, observations and reflective practice, support to develop empathy and interpersonal skills. Develop and record an action plan between trainee and ES to address any difficulties faced using the template in appendix 8.</p> <p>Additional resources:</p> <p>CPPE resources: Consultation skills, teamwork and team community, self-management. Coaching training/coaching support.</p>
<p>Health and wellbeing</p> <ul style="list-style-type: none"> • Trainee requiring additional support relating to a health and wellbeing issue • Time away from training which may require adjustments to the training period 	<p>Confirm trainee is registered with a GP</p> <p>Referral and assessment by Occupational Health as appropriate</p> <p>Develop and record an action plan between trainee and ES to address any difficulties faced</p> <p>Referral to services within the employing organisation (e.g., counselling etc as appropriate)</p> <p>Maintain the confidentiality of the trainee at all times, only disclose to other team members e.g., Chief Pharmacist, if given the explicit consent of the trainee to do so. It is helpful to give a reason why you need to disclose information to other team members, an example would be that additional equipment is required to support the trainee, but the tutor does not hold a budget for this expenditure.</p>

Area Requiring Support	Possible course of action and support
	<p>HEE can amend payments for salary support if a request for less than full time working is made, or an extension to the training period is required.</p> <p>Additional resources</p> <p>CPPE: Work life balance guide. Life skills developing your potential.</p> <p>Stress and anxiety: Anxiety fact sheet , Help with stress fact sheet , Managing stress guide, De-stress you guide, Overcoming Anxiety Guide , Samaritans helpline , Apps for wellbeing and mental health, Unmind – online platform , Headspace – online platform , Daylight: Self-help app , Wellbeing fact sheet, Sleep fact sheet, Sleepio – sleep improvement app, Mindfulness fact sheet,</p> <p>Emotional exhaustion/burnout: Carers Trust, Work-Life Balance Guide, Coping with bereavement factsheet, Carers' breaks and respite care</p>
Disability	<p>Develop and record an action plan using the template in appendix 8 between the trainee and ES to outline any adjustments needed in the workplace.</p> <p>The law relating to reasonable adjustments for trainees with disabilities is adhered to: https://www.nhsemployers.org/retention-and-staff-experience/diversity-and-inclusion/policy-and-guidance/disability/reasonable-adjustments-in-the-workplace</p> <p>Access to work – The employer must make certain changes (known as ‘reasonable adjustments’) to make sure a trainee is not substantially disadvantaged when doing working. The Access to Work application should be initiated by an employee within 6 weeks of starting paid employment. Further details are available at the following link. https://www.gov.uk/access-to-work</p> <p>If a trainee needs to work less than full time or extend the training period, please contact HEE for advice with regards to amendments to salary support payments.</p> <p>Further guidance relating to learning disability and neurodiversity:</p> <p>Dyslexia in the workplace</p> <p>Dyslexia in healthcare training (resource for doctors but relevant to pharmacy training)</p> <p>Autism in the workplace</p>

Area Requiring Support	Possible course of action and support
<p>Alleged discrimination or bullying of the trainee</p>	<p>Seek support of senior pharmacy management and human resources with consent from the trainee.</p> <p>Advice may also be sought from a union.</p> <p>Bullying fact sheet</p> <p>Speak Up Helpline</p> <p>This helpline is a free-phone service for employees, and organisations working within the NHS and social care sector.</p> <p>Telephone: 08000 724 725</p> <p>Web: https://speakup.direct/</p> <p>Whistleblowing Fact Sheet, Raising a concern: pharmacy education and/or training fact sheet, What harassment and victimisation?</p> <p>What is victimisation?</p> <p>Protected Characteristics- Equality Act 2010</p>
<p>Life events</p> <ul style="list-style-type: none"> • Personal relationship issues • Bereavement, critical family illness • Financial challenges • Family and caring responsibilities • Pregnancy • Experiencing trauma • Training away from home country / lack of support network outside workplace 	<p>Develop and record an action plan between trainee and ES to address any concerns.</p> <p>HEE can amend payments for salary support if a request for less than full time working is made, or an extension to the training period is required.</p> <p>When supporting a trainee with any of these issues, ensure confidentiality is maintained, and do not disclose any information to other members of the team or third parties without the explicit consent of the trainee.</p> <p>If you feel the trainee is experiencing abuse or has been the victim of a crime, take advice from your safeguarding lead.</p> <p>Trainees have legal protections via Equality Act 2010. See factsheets below.</p> <p>Support for carers: Carers Trust, Carers' breaks and respite care</p> <p>Family and caring responsibilities</p> <p>Bereavement: Coping with bereavement fact sheet</p> <p>Financial challenges</p> <p>Pregnancy</p>

Area Requiring Support	Possible course of action and support
	<p>Please consider the additional challenges faced by trainees who are from overseas and may have a limited support network. Moving within the UK to a training placement may have disrupted support networks built up during undergraduate studies.</p> <p>Trainees who are away from their home country: https://www.ukcisa.org.uk/Information--Advice/Studying--living-in-the-UK/Health-and-healthcare</p> <p>Trauma: Domestic violence and abuse, Victim Support, Victims & Witnesses, Counselling</p> <p>Relationship problems/breakdown: Resolving Conflict Guide , Relationships and family problems: useful organisations,</p> <p>Addiction: Help with gambling fact sheet , Help with alcoholism fact sheet, Help with drug abuse fact sheet, Eating disorder fact sheet, Addiction Support Helpline ,</p> <p>Finances: Help with debt fact sheet, Managing your money fact sheet, Finding funding fact sheet, Financial Assistance Helpline,</p>

Appendix 6: Consent to involve HEE for additional support and/or advice

The following support can be offered to pharmacy trainees on HEE commissioned placements:

- Signposting to additional support and guidance and ensuring all options have been explored
- Advice regarding action planning
- Advice regarding extensions or amendments to the training period, including requests for part time working or breaks in training.

To request support from HEE please use the relevant regional links below:

- [North](#)
- [Midlands and East](#)
- [London and South East](#)
- [South](#)

Please avoid using email to contact HEE regarding trainees requiring additional support.

On receipt of a request, a member of the HEE pharmacy team will make contact with the trainee and EPD as appropriate.

[How do we process your personal data?](#)

HEE complies with its obligations under the GDPR by keeping personal data up to date; by storing and destroying it securely; by not collecting or retaining excessive amounts of data; by protecting personal data from loss, misuse, unauthorised access and disclosure and by ensuring that appropriate technical measures are in place to protect personal data.

The information that you supply **to request additional support** from HEE will be collected electronically via Jisc Online Surveys. It will be stored safely in accordance with all the relevant information governance standards and HEE policies and procedures. It will be kept for no longer than **two years** and will be securely deleted in accordance with our governance procedures.

[We use your personal data for the following purposes:](#)

1. **To provide additional guidance and/or support to a trainee and/or the educational supervisor**
2. **To inform HEE finance teams of any change to the training period and/or breaks in training**

Transfer of Data Abroad

We will not transfer your data abroad. Please note, however, that AWS hold their information in the Republic of Ireland.

We may share information, where necessary, to assist in the administration of justice, for the purposes of seeking legal advice or exercising or defending legal rights or as otherwise required by the law.

Where the data is used for analysis and publication by a recipient or third party, any publication will be on an anonymous basis, and will not make it possible to identify any individual. This will mean that the data ceases to become personal data.

Your Rights

The GDPR provides the following rights for individuals:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights in relation to automated decision making and profiling.

To exercise all relevant rights, for queries or complaints, please contact in the first instance your regional HEE team. Email addresses are at the end of the page.

Our Legal Basis for Processing

You can obtain further information relating to HEEs legal basis for processing by viewing our privacy notice at <https://hee.nhs.uk/about/privacy-notice>

Further processing

If we wish to use your personal data for a new purpose, not covered by this Data Protection Notice, then we will provide you with a new notice explaining this new use prior to commencing the processing and setting out the relevant purposes and processing conditions. Where and whenever necessary, we will seek your prior consent to the new processing.

I consent to my training location, name, and contact details being supplied to HEE (tick box)

Trainee name.....

If you wish to withdraw your consent at any point please contact the relevant regional team:

North: medicinesoptimisation.north@hee.nhs.uk

Midlands and East: pharmacy.me@hee.nhs.uk

London and South East: Lasepharmacy@hee.nhs.uk

South: Pharmacy.South@hee.nhs.uk

Please retain this form at the training site

Appendix 7: Form A - Trainee progress review record

Please complete this form with the trainee when concerns emerge. This form should be completed in conjunction with the Trainees requiring additional support Management Plan - [Form B](#).

Name of trainee:	
Name of Educational/Designated Supervisor:	
Date of meeting:	
Persons present at the meeting (including role):	
Meeting led by:	
Matrix Level and Area of Concern:	
Description of presenting issue:	
Summary of progress – Update: <ul style="list-style-type: none">• Summary of progress made against objectives and action points set in initial meeting.	

Appendix 8: Form B - Management plan setting

Form B:

Management Plan – Working Document

This is a working document between the ES and their trainee that will be revisited and updated as actions are completed over time. It is important that both the trainee and the ES sign the management plan when it is created and at each subsequent review.

Identified area of concern	SMART objectives	How will I address them? (action & resources)	Date set to achieve goal	Date completed

Document agreed SMART goals and objectives, i.e:

Specific

Measurable

Achievable

Relevant

Time-framed

Use work-based assessments as appropriate, e.g. mini-CEX

Date of next review:	Circle as appropriate	Refer to Occupational Health: Yes/No	Involve: Chief Pharmacist / Senior Pharmacy Management / HEE Pharmacy Team / Other
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Signed:.....
Trainee

Signed:.....
Educational/Designated Supervisor (tutor)

Signed:.....
Educational Programme Director (or equivalent)

Form B continued: Management Plan Review

Review Number..... Date of Review:

Main points discussed (Summary of progress with agreed goals/objectives):

Management plan updated: Yes/No

Date of next review:.....	<i>Circle as appropriate</i>	Refer to Occupational Health: Yes/No	Involve: Chief Pharmacist / Senior Pharmacy Management / HEE Pharmacy Team / Other
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Signed:.....
Trainee

Signed:.....
Educational/Designated Supervisor (tutor)

Signed:.....
Educational Programme Director (or equivalent)

Appendix 9: Version history

This Trainee Support Guide was first published in August 2021.

Please contact the relevant regional teams below with any editorial suggestions.

Version	Purpose/change
September 2021	Addition of regional contacts Addition of regional reporting links Formatting changes Trainee pharmacist amended to trainee foundation pharmacist Accessibility issues addressed

North: medicinesoptimisation.north@hee.nhs.uk

Midlands and East: pharmacy.me@hee.nhs.uk

London and South East: Lasepharmacy@hee.nhs.uk

South: Pharmacy.South@hee.nhs.uk