

HMRC-CREATE

Portfolio Review Worksheet

Feedback is a key feature of this framework and it's assumed that trainees will obtain on-going feedback from peers, mentors, and other stakeholders.

The mentor's comments on the periodic review worksheet will generate narrative feedback that will determine HMRC-CREATE certification. These worksheets are a means towards writing letters of recommendation, planning, and determining the effectiveness of professional development.

Mentee/Trainee

- Schedule an evaluation meeting with your faculty supervisor/mentor for a periodic review. Your portfolio should demonstrate how the competencies were met (evidence).
- Download blank worksheets for each competency from the website and attach them to your portfolio.
- Discuss the outcome with your mentor and revise the original learning plan/PDP to reflect any emerging learning needs.

Mentor/Faculty

- Complete these worksheets during each periodic review.
- Review the evidence provided in the trainee's portfolio to determine her/his progress in the program. Evaluate the evidence and record your comments in the **Evidence** Section (narrative). Under "future activities" provide feedback on any opportunities you recommend to meet new/existing learning needs.
- For each role and competency, evaluate the **evidence** provided in the trainee's portfolio. Make note of any specific areas where the trainee needs still to grow in the "*Recommended Future Growth Activities*" column and discuss follow-up activities.