



Occupational Therapy
Board of New Zealand

TE POARI WHAKAORA NGANGAHAU O AOTEAROA

FOSTERING FAITH AND CONFIDENCE IN THE PROFESSION

Introduction to the ePortfolio

MARCH 2022

Haere mai – welcome!

The Introduction to the ePortfolio is for Aotearoa New Zealand practising occupational therapists.

To hold a practising certificate, you need to provide ongoing evidence of your competency.

Why? Well:

- it will affect the outcomes for the people you work with
- it ensures that you're keeping your skills up to date to be the best therapist you can be
- it allows us to remain self-regulated and maintain our great reputation
- it's required by law.

To assist you, The Board (The Occupational Therapy Board of New Zealand Te Poari Whakaora Ngangahau o Aotearoa) has developed the online ePortfolio system.

We understand that between practising and life in general, it can be hard to put in place a plan for professional development and gather evidence to demonstrate ongoing competency.

Andrew Charnock
Chief Executive/Registrar

Occupational Therapy Board of New Zealand
March 2022

Overview

The Introduction to the ePortfolio details the way you need to use the ePortfolio to meet your requirements as a registered health practitioner.

The Introduction to ePortfolio is supported by the ePortfolio User Guide, a comprehensive technical manual with screenshots to make the process clear and approachable.

There are three sections to the handbook:

1. An overview of the legal requirements and standards _____ page 4
2. How the ePortfolio helps to meet those requirements _____ page 7
3. How the ePortfolio process works _____ page 9

ONE NOTE BEFORE WE BEGIN

The ePortfolio can document the planning and achievement of your professional development activities, but it also provides a framework for ongoing reflection and improvement of your practice.

While meeting legal requirements is obviously critical, it's important to remember that the ultimate aim is to be a fantastic therapist. You're helping Kiwis to return to leading better, healthier lives!

The Board's goal is to support that mission.

REQUIREMENTS

TE TIRITI O WAITANGI

HPCAA - Health Practitioners
Competence Assurance Act
2003

Code of Ethics for Occupational
Therapists 2022

Competencies for Registration
and Continuing Practice 2022

THE FIVE COMPETENCIES

1. Applying whakaora
ngangahau occupational
therapy knowledge, skills
and values

2. Responsiveness to Te
Tiriti o Waitangi

3. Developing and
sustaining
partnerships

4. Practising in a safe, legal,
ethical and culturally
competent Way

5. Practising
responsively and
upholding the
occupational therapy
profession

SOLUTION

ePortfolio - an online living record of professional development

Built from the
Competencies
for Registration

Facilitates reflective
practice

Enables monitoring and
auditing

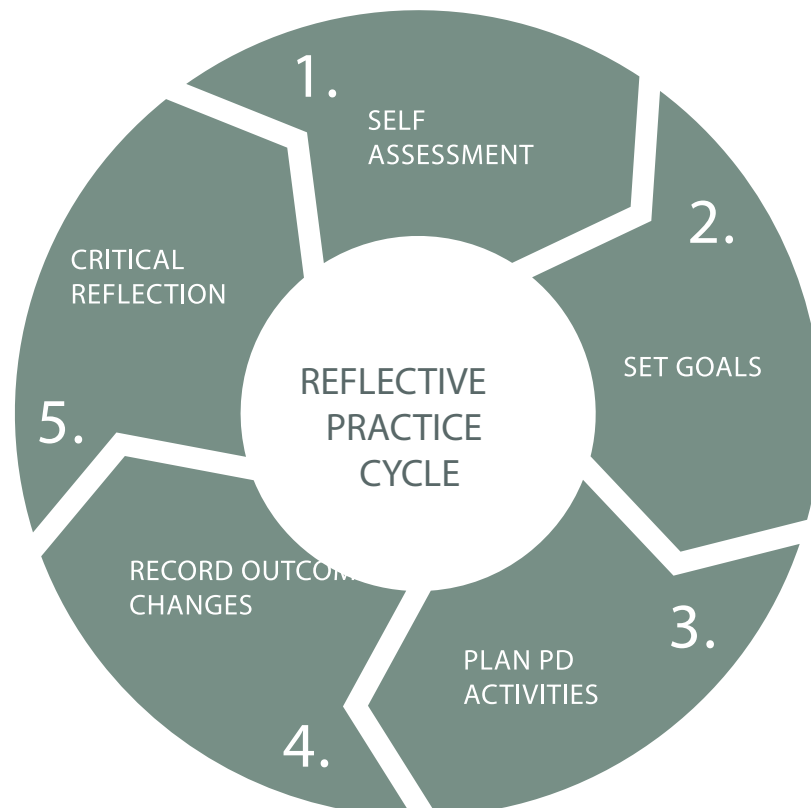
Supports a high trust
model

PROCESS

A SUPERVISED REFLECTIVE PRACTICE CYCLE OF THE COMPETENCIES

Self-directed and
customisable for
each individual

Reliant on
professional
accountability



1. Overview of Legal Foundations and Requirements

Annual certification (or recertification) of occupational therapists relies on a high-trust model.

The privilege of being a self-regulated profession rests on maintaining the integrity of this model, so it is important to be aware of the legislative framework and guiding documents of the model.

TE TIRITI O WAITANGI

Te Tiriti o Waitangi is the founding document of Aotearoa New Zealand. It shapes the diverse historical and socio-political realities of Māori and all other settlers and their descendants.

Understanding how Te Tiriti o Waitangi affects all our lives is essential for occupational therapy practice that is appropriate for the Aotearoa New Zealand context.

HPCAA - THE HEALTH PRACTITIONERS COMPETENCE ASSURANCE ACT 2003

The Board is required by HPCAA to protect public health and safety by monitoring and ensuring the professional competence and fitness to practice of all registered practitioners. This includes setting standards for clinical competence, cultural competence and ethical conduct.

Three key requirements for practitioner competence are covered by the HPCAA:

- Demonstrating ongoing competence to practice.
- Notifying relevant authorities of any concerns about practice.
- Maintaining an individual's mental and physical fitness to practice.

EDUCATION AND TRAINING

The Board prescribes the scope of practice and the qualifications required to practice occupational therapy in Aotearoa New Zealand. The HPCAA requires it to accredit and monitor education institutions and degrees, courses of studies, or programmes (section 118(a)) to ensure occupational therapists are qualifying with the right competencies.

Only graduates of an approved programme are eligible to apply to be registered to practise in Aotearoa New Zealand. The Aotearoa New Zealand occupational therapy curriculums are based on the Competencies for Registration and are updated when these are changed.

CODE OF ETHICS FOR OCCUPATIONAL THERAPISTS (2015)

The purpose of the Code of Ethics is to:

- Inform and protect consumers of occupational therapy services.
- Protect the integrity of the occupational therapy profession.
- Set the standards of professional and ethical behaviour which occupational therapists are expected to uphold.

The Code cannot address every possible ethical issue and should be read in conjunction with the Health and Disability Commissioner (Code of Health and Disability Services Consumers' Rights) Regulations 1996. The Code of Ethics is an additional set of professional standards required for competent practice and should be read alongside the Competencies for Registration and Continuing Practice.

COMPETENCIES FOR REGISTRATION AND CONTINUING PRACTICE (2022)

The Competencies are written and developed by the profession in conjunction with The Board.

They are regularly reviewed and updated to respond to the changing requirements of occupational therapy practice. The document informs much of The Board's regulatory activity and guides the curriculum for undergraduate occupational therapy education. It is a legal document which is enforceable through legislative processes.

There are five core areas which are the minimum threshold of competence for all practising occupational therapists. They are:

1. Applying whakaora ngangahau occupational therapy knowledge, skills and values
2. Responsiveness to Te Tiriti o Waitangi
3. Developing and sustaining partnerships
4. Practising in a safe, legal, ethical and culturally competent way
5. Practising responsively and upholding the occupational therapy profession.

Each competency is fully described in the *Competencies for Registration Handbook*.

To become registered, all registrants must demonstrate that they meet the threshold of competence in all five competencies.

To continue to hold a practising certificate, therapists must maintain the required standard in each competency and provide evidence of this.

SUMMARY

The Board works with therapists to set the qualifications, standards of competence and fitness to practice occupational therapy under the HPCAA 2003. These are all anchored by the overarching framework of Te Tiriti o Waitangi.

The standards of competence are laid out in the Competencies for Registration and Continuing Practice, Code of Ethics and any other standards the Board publishes relating to specific areas of practice.

Let's now look at how the ePortfolio helps you meet those standards.

2. How the ePortfolio helps to meet those requirements

WHAT IS THE EPORTFOLIO?

The ePortfolio is an online platform where you document the planning and achievement of your ongoing professional development (PD).

The ePortfolio has been defined as:

“A purposeful collection of information and digital artefacts that demonstrates development or evidences learning outcomes, skills or competencies. The process of producing an ePortfolio (writing, typing, recording etc.) usually requires the synthesis of ideas, reflection on achievements, self-awareness and forward planning; with the potential for educational, developmental or other benefits” (Cotterill, 2007).

It is recognised as a recertification programme, as described in section 41 of the Health Practitioners Competence Assurance Act 2003 (HPCAA).

THE FIVE CORE COMPETENCIES

The OTBNZ ePortfolio has been designed to provide a centralised online place for collecting evidence of your ongoing PD in the five core competencies (fully described in the *Competencies for Registration Handbook*).

It is important to know that it's okay to say: “I am not meeting the expected standards in my practice, and I'm going to address this through the ePortfolio process”.

A TWO-YEAR CYCLE

The ePortfolio cycle is a two-year period and is an ongoing process of active engagement. You will engage in critical self-reflection of your practice with the support and input of an ePortfolio supervisor.

See **REFERENCE GUIDE** SECTION 2.2 for a full description of the cycle.

EPORTFOLIO SUPERVISORS

Supervisors are expected to support therapists with completion of an appropriate and developmentally-progressive ePortfolio. They are required to make statements to confirm the ePortfolio meets these standards.

The ePortfolio operates on a high-trust model relying on professional responsibility and accountability of therapists.

See **REFERENCE GUIDE** SECTION 2.3 for requirements around ePortfolio supervisors.

LEGAL DECLARATIONS

As part of the high-trust model, you are required to make legally binding self-declarations every year to obtain an annual practising certificate to say that you are fit, competent to practice and your ePortfolio is up to date.

A third-party attestation by another practising occupational therapist is also made every year to verify this.

Once every two-year cycle your ePortfolio supervisor also makes statements to confirm they have sighted and discussed your ePortfolio and are satisfied that your goals and developmental activities are appropriate for maintaining competence, relative to your level of seniority, experience, and practice context.

MONITORING AND AUDITS

The ePortfolio allows The Board to monitor the ongoing competence of practising therapists through routine audits. The Board can access the content of an ePortfolio at any time, if necessary.

SUMMARY

As an online documenting system that can be monitored and audited, the ePortfolio provides evidence of ongoing development in the five core competencies.

This evidence platform allows for high-trust declarations of fitness and competence to practice from yourself and your supervisor, thereby meeting the legal and ethical requirements of our profession.

Next up: how the ePortfolio process works to set goals, achieve them, and reflect ongoing improvements to your practice.

3. How the ePortfolio process works

OVERVIEW

It is important to note that the ePortfolio is designed for the competence required in the General Scope of Practice: Occupational Therapy, which states:

Occupational therapists are registered health professionals, who use processes of enabling occupation to optimise human activity and participation in all life domains across the lifespan, and thus promote the health and well-being of individuals, groups, and communities.

These life domains include learning and applying knowledge; general tasks and demands; communication; mobility; self-care; domestic life; interpersonal interaction and relationships; major life areas; and community, social and civic life.

Enabling occupation incorporates the application of knowledge, principles, methods, and procedures related to understanding, predicting, ameliorating or influencing peoples' participation in occupations within these life domains.

The ePortfolio has been designed to accommodate all occupational therapy in the general scope of practice including:

- traditional clinical roles
- non-traditional and emerging roles
- education and academic roles
- management and leadership roles
- specialist areas of practice.

THE REFLECTIVE PRACTICE CYCLE

The heart of the ePortfolio is a continuous cycle of five steps that addresses each of the five competencies. Those five steps are:

1. Self-assessment of competence and identification of areas for professional development
2. Setting of goals to address and attain specific competence
3. Planning of PD activities to achieve the goals
4. Recording changed practice and improved outcomes for the people you work with, as well your colleagues and any employees or students
5. Critical reflections at the completion of the cycle.

Let's look at each of the five steps.

Step 1 SELF ASSESSMENT

The first step is to consider the five key competencies and the performance indicators that sit under them. Reflect on where there may be areas for improvement and professional development, to meet the following outcomes:

1. Applying whakaora ngangahau occupational therapy knowledge, skills and values

You apply your knowledge, skills and values as kaiwhakaora ngangahau occupational therapist by engaging with and supporting people and whānau to have a life they value, through enabling occupation and inclusion in communities.

2. Responsiveness to Te Tiriti o Waitangi

As tangata whenua and tangata Tiriti, you recognise your role and responsibilities under Te Tiriti o Waitangi and apply your knowledge to work for equitable outcomes for Māori wellbeing. Te Ao Māori, tikanga, wairua, whānau hauora and taonga such as te reo Māori are respected and supported.

3. Developing and sustaining partnerships

You promote and facilitate interdisciplinary collaboration and cooperation for people's health and wellbeing services.

4. Practising in a safe, legal, ethical, sustainable and culturally competent way

You act with integrity. You meet safety, legal, ethical, and cultural requirements and expectations in your professional practice.

5. Practising responsively and upholding the occupational therapy profession

You engage with your profession. You ensure your practice is professional, current, responsive, and evidence informed. You take responsibility for your own professional development.

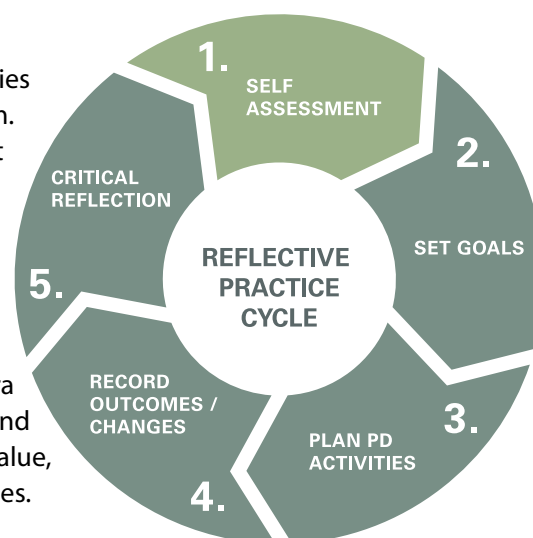
See the Competencies Handbook for full descriptions of the competencies.

* Client refers to any individual, family or whānau, community, organisation or population you provide a service to.

The self-assessment of competence needs to consider knowledge, skills and attitudes necessary for the therapist to be safe and meet the competencies in their practice setting.

Although it is called a 'self' assessment, there is an expectation that therapists are seeking and responding to feedback from a variety of other sources about their competence.

This feedback may be received through formal performance appraisal processes, peer review, supervision, multi-disciplinary teams or directly from the people who the therapists works with. The Board considers receiving this feedback as an important element in self-assessment of competence.



The self-assessment should include a brief introductory description of contextual factors to set the scene for each cycle. These may include past experiences, practice setting, team environment, upcoming changes in work role or responsibilities, and service user expectations.

Step 2 SET GOALS

There needs to be at least one goal for each competency area in every two-year cycle and they must be set within three months of commencing the cycle. These goals should address the areas identified in the self-assessment.

ePortfolio goals should:

- be discussed and reviewed with your ePortfolio supervisor
- reflect your level of experience and practice responsibilities
- be specific and realistic
- have PD activities documented.

Goals can be long-term and cover the whole cycle or can be achieved in shorter time frames.

There always needs to be at least one goal in progress during the cycle until all five competency areas have been completed.

Goals can be worked on concurrently, one after the other, or in any other way that best suits individual situations. Once a goal has been achieved a new goal does not need to be made until the next cycle.

New goals or more than one goal can be set to achieve the PD identified in the competence self-assessment. This is at the therapist’s discretion.

If a new goal is set that does not relate to the existing self-assessment of competence, a new self-assessment needs to be written.

Goals can be revised and updated at any time. This may be necessary when therapists change employment or work roles within an ePortfolio cycle. Reasons for the revision or change should be documented in the outcomes and critical reflection sections under the relevant goal.



Step 3

PLAN PROFESSIONAL DEVELOPMENT (PD) ACTIVITIES

PD activities are the plan of action to achieve your goals. You may document several activities if this is required to complete the plan.

To keep the activities realistic to achieve, the level of complexity and number of activities should be carefully considered over the whole ePortfolio. One to three meaningful and targeted activities for each goal are adequate.

PD activities need to:

- Clearly and logically connect to achieving the associated goal
- Describe a specific action or task
- Be measurable and finite.

Activities which can be carried out as part of daily practice or workplace PD are ideal to use to reduce additional work for the therapist.

Varying the type of activities used over the five competence areas will provide a range of learning opportunities.

Some examples of appropriate PD activities are:

- Initiating a peer review of practice
- Offering to supervise a student or colleague
- Spending time with co-workers, service users or other organisations to understand different ways of working
- Piloting new assessments or interventions
- Signing up for journal alerts or other notifications of educational activities

See **REFERENCE GUIDE** SECTION 3.1 for more examples.

Therapists should not delete completed or discarded goals and PD activities. If activities have not been completed this should be documented in the outcomes section of the ePortfolio with an explanation of why this has happened.

All experiences contribute to PD and can be reflected on in some way to progress, maintain or plan for continuing competence.



Step 4 RECORD OUTCOMES / CHANGES IN PRACTICE

The Outcomes / Change in practice section in the ePortfolio is where you document how your PD activities have led to a change in your practice and improved outcomes for the people you work with. Reference to the Ministry of Health's definition of equity and health outcomes may be useful:

In Aotearoa New Zealand, people have differences in health that are not only avoidable but unfair and unjust. Equity recognises different people with different levels of advantage require different approaches and resources to get equitable health outcomes.

A specific example of what your new practices were needs to be provided to substantiate your outcomes. For instance:

"I now try and carry out part of my assessments in the persons own environment. This has meant allowing an extra visit in my diary for each referral and re-prioritising my time management each week. This has resulted in me being able to follow up and discuss solutions in much more depth on the phone and via telehealth with the person and whānau before making the final recommendations."

"I now will visit with our Māori health worker for most visits to Māori whānau. We often continue to visit together and plan with the whānau what needs to happen for the next week or two. This has led to the needs assessor commenting on not needing to put in as much home help support for several people because of everyone knowing what to do and who was doing it."

"I have created a flow chart for me and my staff to follow when there are complex ethical issues we have to resolve. We now use this when making funding and service provision decisions. It has helped us clarify what our ethical responsibilities were to make sure the person continued to receive the rehab they needed, and we have been able to argue for a continuation of services."

See [REFERENCE GUIDE SECTION 3.2](#) for more examples.

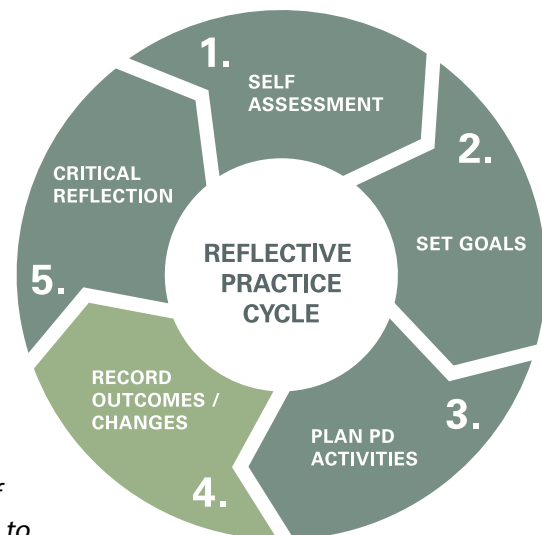
If a goal or PD activity has not been completed an explanation of this can be recorded here.

Documenting your achievements as they occur is a way to keep an up to date record of ongoing PD over the two-year cycle.

Digital artefacts

Where possible, documentation or a digital form of evidence - digital artefacts - should be uploaded beside the relevant PD activity.

Digital artefacts provide additional substantiation of competence and achievement of your goals.



These should be anonymized and not contain any identifiable information. Clinical notes, assessments or minutes of meetings are not appropriate to upload due to the confidential nature of this information.

Some examples of appropriate digital artefacts are:

- Enrolment acceptance letters
- Certificates of attendance
- Screenshots or short video or audio clips
- Reflective journaling
- Performance review, performance management or return to work plans

See **REFERENCE GUIDE** SECTION 3.2 for more examples.

Step 5 CRITICAL REFLECTION

The critical reflection step is essential to complete the reflective practice cycle for each area of competence.

It is important that the PD activities are not just a series of boxes to check off; outcomes of these activities need to be reflected on through a critical lens to develop insight and continue to develop as a practitioner.

An essential component to critical reflection is the requirement of the therapist involved to understand themselves and their role in practice outcomes.

For Aotearoa New Zealand, developing a critical reflexivity of practice is particularly important so therapists can proactively act as a Te Tiriti o Waitangi partner to break down systemic and institutional barriers and provide equitable standards of healthcare for Tangata Whenua.

Health providers need to question their own biases, attitudes, assumptions, stereotypes and prejudices as part of their critical reflection process.

Critical reflections for each competency should inform the self-assessments of competence in the next ePortfolio cycle to demonstrate a progression in professional development.



SUMMARY

It is this cycle of five steps, focusing on the five competencies, that helps keep our profession safe and supports our excellent reputation.

Your engagement with the ePortfolio system as the central documentation of your professional development allows us to work in a high-trust model and retain the privilege of being a self-regulated profession.

And, as always, we maintain the goal of being the best therapists we can be.

Where to from here?

The *Competencies Handbook* is a deep dive into the five competencies and is a vital document for self-reflection and setting goals.

The **REFERENCE GUIDE** supports this handbook with in-depth information to guide you as you start the ePortfolio process. It comprehensively covers questions such as:

What are the requirements for an ePortfolio supervisor?

What happens if the annual practicing certificate renewal falls in the middle of the ePortfolio cycle?

How does the audit process work?

It provides answers to these and many other queries, and it offers further clarification about topics in this handbook.

The ePortfolio User Guide provides a comprehensive guide to using the ePortfolio, complete with screenshots. An ePortfolio user video tutorial is also available on YouTube. These are your user manuals for navigating the ePortfolio.

SUMMARY

Planning for each ePortfolio cycle should be a useful and meaningful to you. It will help you progress your career, as well as ensuring you have the competence to create change and transform other people's lives.