

Applicant Guidance: **Full portfolio submission**

UKPHR Specialist Registration by Portfolio Assessment

April 2025

This document will be updated periodically, so please check the UKPHR website to ensure you are using the current version.

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Please note that this guidance is for individuals who have been approved through the pre-application process to submit a full portfolio for assessment.

About the SRbPA route

1. Specialist registration with UK Public Health Register (UKPHR), General Medical Council (GMC) or General Dental Council (GDC) is an essential requirement for Consultant or Director of Public Health roles.
2. The UKPHR registration process is a **retrospective** route to Specialist Registration that requires an individual to demonstrate that they meet a set of competencies that aligns with the 2022 Public Health Specialty Training Curriculum. The route gives those who did not complete a Public Health Specialty Training Programme to demonstrate that the entirety of their experience and knowledge is equivalent to a newly qualified consultant in Public Health.
3. The SRbPA route has two stages:
 - a. The **pre-application process** assesses whether the applicant is working at the right level (i.e. a newly qualified consultant) and will be able to provide evidence across the full range of competencies upon submission of their full portfolio.
 - b. **Full portfolio** submission is only made if a pre-application is approved and UKPHR is satisfied that the applicant is working at the right level.
4. **Before you start compiling your portfolio, it is crucial that you read this document and the Show How and Know How competencies and guidance.**
We also recommend that you listen to the podcasts our Moderators have recorded. These are available on our [website](#) and our YouTube page:
<https://tinyurl.com/yxdw6yzd>
5. UKPHR want you to succeed, but this is a long and challenging process for most. This guidance is meant to help you present as coherent a case as possible for your registration. Please note that if you do not follow the advice given in this and other guidance documents, you are unlikely to have a successful application.

What is in a portfolio?

6. Applicants are instructed to submit a combination of paper and electronic documents:

<p>By post</p> <p>Please post 4 collated copies.</p> <p>Please ensure each copy is in a format that the assessors can access – e.g. in a ring binder.</p>	<p>Electronically</p> <p>Please ensure you keep all document names as short as possible e.g. KH1.3.a, KH1.3.b, etc) and that you PDF as many portfolio evidence items as possible, especially copies of emails, as these can become corrupted easily.</p> <p>Please do not embed documents within other documents</p>
<ul style="list-style-type: none"> • Know How narratives • Show How narratives 	<ul style="list-style-type: none"> • Completed and signed portfolio application form • Specialist registration by portfolio assessment proforma with the evidence sections completed • Curriculum Vitae • Current job description • Know and Show How matrices • Testimonials (if applicable) • A current reference • Current Personal Development Plan and CPD activities (as evidenced by formal CPD scheme) • Know How narratives • Show How narratives • Know How evidence • Show How evidence • If changed since pre-application: Certified copies of qualifications and membership of professional bodies; change of name deed if documents are in a different name

7. If any of the files can't be uploaded, please contact the UKPHR office. **Do not embed documents into documents submitted electronically**, for ease of navigation for the assessors.

Submitting your portfolio

8. Your portfolio **must be submitted within 18 months** of the date your pre-application was approved. We may grant extensions to this deadline if you are on [parental leave](#) or can demonstrate [extenuating circumstances](#). If you need to request an extension, please let us know as soon as possible.
9. If we have not received your portfolio within 18 months and you have not requested an extension, your application will be terminated. If at a later stage you would like to reconsider this route, you must reapply for approval via the pre-application process.

10. Once you have compiled your portfolio, please send the documents we have requested by post to UKPHR, 16a McLaren Building, 46 Priory Queensway, Birmingham, B4 7LR.
11. Email the documents you are sending electronically to register@ukphr.org. You may wish to use a file transfer service, such as We Transfer, Dropbox, Google Drive, etc. Please do not send any items on a memory stick/USB.
12. We'd suggest letting us know ahead of time when to expect your portfolio by emailing us at register@ukphr.org.

Fees

13. You must pay the required initial portfolio submission fee when you submit your portfolio - it will not be assessed without this. Fees are on our website: <https://ukphr.org/fees-and-charges/> and may change from time to time.
14. A fee is payable for each assessment (this means that for assessment of resubmissions and/or clarifications, a fee will be payable). Please see the link above for the relevant fee payable.
15. If your portfolio is a complete return or considered to be unassessable, no refund of your portfolio assessment fee will be made.
16. Payment can be made via one of the following methods:

BACS:	Bank: CAF Bank Account name: Public Health Register Sort code 40-52-40 Account number 00036414
PayPal:	Using the account register@ukphr.org

Portfolio requirements

17. *Each component of the portfolio application is addressed below.*

The application form

18. Please complete the [portfolio application form](#) in full with your most up to date information.

Navigation and the Matrix

19. It is *essential* that your supporting evidence is clearly and consistently referenced across the assessment proforma and the narrative for each competency claim. If the assessors cannot easily navigate to your evidence to support the claims you are making, they may decide the portfolio is unassessable.
20. You must complete the matrices for both the *Know How and Show How* competencies, outlining the name of the work / course as evidence with a summary used to demonstrate each competency. The matrix is used by assessors to help them navigate their way through your portfolio. This must be updated with each

clarification or resubmission of evidence. We recommend you retain electronic versions of your matrices. Please see templates on our [website](#).

Assessment proforma

21. The assessment proforma lists each of the Know How and Show How competencies and is used by our Assessors to record their assessment of how you meet each competency. We ask that you please list each piece of evidence you're submitting in your portfolio, in the appropriate field next to each competency. Please ensure you have completed the form in full, taking care not to amend the format. A Microsoft Word version of your assessment proforma must be emailed to UKPHR; do not PDF this document as it will be used by UKPHR internally to record assessment findings.
22. In the 'evidence' column each piece of evidence must be clearly numbered to refer to each competency. The numbering must match the names of the evidence files.
23. If you receive a request for clarifications and/or resubmissions, you must update your list of evidence using a different coloured font (see section 81 below) so the assessors can easily see where the new evidence is. Please ensure you retain an electronic copy for your reference. Ensure the evidence files are consistent with that in your narratives.

Continuing professional development and Personal Development Plan

24. On your application form you must describe your current CPD arrangements in Public Health. The CPD activities should be up-to date and linked to a Personal Development Plan which must include detail of how you expect to meet your objectives. Your Personal Development Plan must relate to the competencies, a management PDP alone is insufficient.
25. All UKPHR registrants are required to engage in CPD in line with the Faculty of Public Health's CPD policy. To demonstrate that you have appropriate **CPD**, you must show that you have been actively participating in formal CPD activities for at least one year prior to submitting the pre-application. This CPD must include an element of reflection. Many applicants will use the Faculty's CPD scheme or one of the others recommended by the Faculty, a list of which can be found here: <https://www.fph.org.uk/professional-development/cpd/exemption-from-cpd/>
26. There should be sufficient evidence throughout the portfolio with CPD and reflective activity included in the evidence summaries and development summaries to fulfil SH 9c.

Testimonials

27. Testimonials should be completed by someone who is preferably a Public Health Specialist, but if they are not, this can be a senior colleague who can appropriately interpret the relevant competency. They are used to confirm the details of specific work within your portfolio to support Show How competencies. They can be used to verify your personal involvement in the work cited and the competency claimed. Occasionally a testimonial can be used as evidence or to validate other evidence where not otherwise documented. Please use the [testimonial template on our website](#), with each testimonial only covering one Show How competency.

28. Testimonials should not be used to demonstrate Know How evidence. However, an exception can be made if you have completed an MPH and provide evidence of graduation but cannot provide course content. In this case, testimonials from a course tutor/developers can be used to enhance evidence, providing the testimonial is specific to the relevant parts of the competency. However, you should always try to obtain the course module outlines from the Higher Educational Institution in the first instance.

Reference

29. A reference from a senior public health professional must be provided using the UKPHR structured reference form.
30. If you submit your portfolio within 12 months of receiving approval from UKPHR via the pre-application process, you can use the same reference. A new reference will not automatically be required if you change jobs between preapplication acceptance and portfolio submission in this 12-month period.
31. If you submit your portfolio more than 12 months after receiving UKPHR approval of your pre-application, you must submit an updated reference.

Certified copies of documents

32. Any certificates or other documents that need to be certified can be done by your referee, on the reference form.

The Know How competencies

33. All Know How and Show How competencies are outlined in full on the [UKPHR website](#). These are divided into a number of Key Areas each of which include a number of competencies. These competencies are mapped to the [Faculty of Public Health Specialty Training Curriculum \(2022\)](#).
34. Upon considering the know how competencies, **assessors will ask themselves “Am I assured this applicant has sufficient knowledge in this competency (if relevant also has evidence of CPD). So, could they be given a piece of work relevant to this competency and require little help?”** We strongly emphasise that applicants think from the perspective of the assessor. They are looking through the lens of the competency NOT the work.
35. Please keep this in mind while compiling your portfolio evidence. In general, we’re looking for master’s level experience.

The Faculty of Public Health Diplomate exam (DFPH)

36. **If applicants have passed the Diplomate exam less than 5 years from the date of their portfolio submission**, they are exempt from providing additional evidence for all Know How competencies.
- If applicants have passed the Diplomate exam 5 -10 years prior to the date of their portfolio submission**, they are exempt from most Know How competencies **except for those containing the word ‘current’** (KH6.f, KH6.h, KH7.c, KH7.e, KH7.f), **where they must demonstrate up to date knowledge of the current situation.**
- Please ensure to submit your certificate confirming your pass, certified by your referee on your reference form.

37. If you have not passed the DFPH then you must submit evidence against each competency that is dated within the past 10 years prior to the date of portfolio submission. Those competencies containing the word “current” need evidence of your learning of the current situation.
38. If you are planning to take the DFPH before submitting your portfolio, we strongly advise you to do so prior to submitting your pre-application, as passing the exam on the first attempt cannot be assumed.

Currency requirements and parental leave

39. If you have taken parental leave during the time leading up to a successful preapplication submission, the 10-year currency rule applies when you submit your portfolio.
40. If you take parental leave after your pre-application has been approved, or during your portfolio assessment, we may grant a pause for currency requirements during this time. You can read more about this in our [parental leave policy](#).

What does evidence for Know How competencies look like?

41. For each Know How competency, you must provide evidence of how you acquired the knowledge. Evidence must be dated within 10 years of the portfolio submission, except for those with the word current within them, see 36 and 37 above. If learning took place more than 10 years earlier, additional evidence addressing how you updated your learning during the past 10 years is needed.
42. We require information on your formal qualifications that provides sufficient detail to relate to each word of the claimed competency. If you're providing a certificate of attendance, it should be from the organisation with their “identifying text / logos” on it. Submitting evidence of attendance of a course alone is insufficient, as it usually does not relate in enough detail to the specific parts of the competency.
43. Objective evidence of attendance of a course must be supported by dates, corroborative evidence in the form of the syllabi from the Further Education Institution (FEI), including module descriptors, curriculum, course objectives and/or course materials including handouts. Materials must precisely reflect the competencies. If evidence for part of or an entire competency is from an assessed module / course, but the assessment was not passed, write your understanding of the competency (see below).
44. If evidence is from courses or learning activities that are not part of a Master's degree, assessors will need to see evidence demonstrating knowledge relating to the relevant part of a competency. Evidence can be course objectives and/or course materials including handouts, whichever precisely confirm each element of the competency or part being claimed. Online courses require a dated attendance certificate (with the organisation logos on as above) and clear content. Exceptionally, emails can be used where the original certificates / course content is no longer available. These must have sufficient content to certify your claim.
45. On the job learning can be appropriate but you need to explain a) what the learning was and how it was acquired b) your understanding of the competency from that learning, see below.
46. If there is insufficient evidence for any part of a competency then you must write out your understanding of the competency in a Knowledge Summary. Please also

indicate how the knowledge was gained i.e. from learning activities such as a course, on the job learning or self-directed study. Assessors expect to see some critical or thoughtful analysis of the learning, and consideration of the following questions:

- a. Relevance - is there an appropriate match between the evidence presented and the learning claimed?
- b. Sufficiency – is there sufficient evidence to demonstrate the achievement of the learning claimed at the right level?
- c. Authenticity – is the evidence clearly related to the applicant's own efforts and achievements?
- d. Currency – does evidence relate to current learning as relevant for each competency?

47. Assessors will be looking for integrated knowledge across the competency statement, so ensure to link your knowledge to each part of the competency if there is more than one element. For example, KH1.D has three separate components:

- Techniques and methods for the analysis of health data, including appropriate statistical analysis, trend analysis and modelling, the principles of surveillance and qualitative analysis
- The methodology and uses of small area statistics
- Strengths and weaknesses of different analytical techniques to describe and analyse health needs and health inequalities in different populations

If knowledge gained through courses does not address each of the elements of a standard, your Knowledge Summary must address any missing elements.

48. Here are some crucial tips and suggestions for presenting your Know How evidence:

- a. You must demonstrate that knowledge has been acquired, not necessarily applied; the latter is demonstrated in the Show Hows. If your Show How evidence is used to confirm all or part of a competency, make sure you signpost to that evidence in both the Know How narrative and Show How narrative.
- b. Use a clear signposting system which directs the assessor to the specific piece or pieces of evidence you are using to support your claims. Ensure all evidence is included and consistently referenced across all elements of your application.
- c. Do not just send in articles, websites, names of textbooks, etc that you contributed to that you think cover the content of the competency. Assessors want demonstration of your learning. Any original material must be accompanied by further information on your actual learning and understanding mapped to the competency. Think: "how would these demonstrate my understanding"?
- d. Do not cite attending the FPH Diplomate revision course solely as evidence
- e. Do not cite practitioner level courses as evidence, as these are not at the appropriate level.
- f. If citing a document, then indicate where the relevant text for the competency being claimed is within it; Assessors will not wade through lots of text to find what they need.
- g. Do merely state "I am familiar with...." a part of a competency, as this does not demonstrate your understanding of it.
- h. Be careful about using word "current" in a Knowledge statement. If your original learning is not completely current knowledge, then you must evidence how you remain updated and how you've gained current knowledge.

- i. If course module descriptions do not fully reflect the wording of the competency, you will need to provide a Knowledge statement filling the gaps to ensure you cover the entirety of each competency claimed.
- j. If in doubt about your evidence for part of or an entire competency, write your understanding of it in a Knowledge statement.
- k. We find that when clarifications for Know How competencies are required, it's usually due to a lack of information on course content or attendance certification, insufficient detail, or insufficient assurance of learning achieved.

The Show How competencies

- 49. All Show how competencies are on our [website](#) and map to the Public Health training curricula (2022).
- 50. The presentation of your evidence for Show How competencies is based on a series of narratives describing the work that you've done, your role in it, and how it relates to each competency being claimed. The narrative gives context to your work and presents your evidence to show that you've met the competency or competencies. Note that one piece of work/narrative can cover more than one competency and be very clear which is it referring to. There is no set number of narratives required, but they must collectively cover all Show How competencies.
- 51. Overall, **across all Show How competencies, at least 50% of your evidence must be less than five years old at the point of your portfolio submission.**

Narratives

- 52. Please use the Narrative template on our [website](#).
- 53. The narrative should be drafted to convince the assessor that you have demonstrated the competencies you are claiming. Assessors will not 'join up the dots' for you. You will need to ensure that in addition to telling a compelling story about how the work you have done relates to the competencies you are claiming, you must clearly signpost the relevant evidence you are citing and make sure that your portfolio is easy to navigate.
- 54. The narrative consists of a brief overview of the work being used to evidence the competency being claimed and a description your role in it, which should at the right level of seniority (i.e. the level of a newly qualified consultant). Describe how your role in this work provides evidence for the competency. Objective evidence, clearly signposted, must be referenced to support all claims. The title of each piece of evidence must be listed accurately in the assessment proforma.
- 55. While there is no requirement regarding the number of narratives submitted, each competency should be claimed once where possible, and that each narrative should not aim to cover too many competencies; up to four competencies per narrative is very helpful to ease assessment.
- 56. A narrative should contain the following elements:
 - a. A list of the competency, or competencies, being addressed
 - b. A brief overview describing:
 - i. The aims and objectives of the piece of work (Why?)
 - ii. The organisational and chronological context of the work (Where, When?)

- iii. An overall brief description of your individual role and responsibilities within the work
 - iv. A description of the methodology and approach to the work, explaining why that approach was chosen including theoretical underpinning, evidence base as appropriate (How?)
 - v. Key results and outcomes of the work, which should include major outputs such as change in policy, change in practice, or change in health outcomes (what happened?)
 - c. A section which focusses on each competency being claimed, writing how your role and actions demonstrated that competency, with adequate supporting evidence
 - d. A section reflecting on your learning from the experience focussing on the specific competency, or competencies, being claimed.
 - e. A list of the evidence that is being referenced, dated and clearly signposted to the competencies being claimed. This must match the evidence column in the Assessment Proforma.
57. UKPHR does not provide examples of 'good' narratives; styles of writing differ greatly and good can be varied. Good narratives are very heavily based on 'context', which will vary significantly depending on the work being written about.

Reflection

58. Reflection is a key part of your narrative and outlines what you learned from the work that is relevant to the claimed competency. A good reflection is invaluable to assessors.
59. There are many approaches to reflection. The "What? So what? Now what?" framework is one example of a simple way to structure reflections, whether it be a reflection on a single event or a period of time. Reflections could include personal experience, interaction or observation of others and formal/informal learning events. Key elements in this framework that might be helpful to consider:
- a. **What?** focuses on thoughts at the time of an experience. It explores thought processes when a particular action or decision was taken and how those may have impacted on actions and feelings. E.g., 'What was I thinking when I took the actions or made the decision that I did'
 - b. **So what?** involves considering the significance of what happened as well as the values and feelings at the time of and prompted by the experience, and why these may influence future learning or actions. E.g., 'How did I feel at the time of and after the experience, why was it important?'
 - c. **Now what?** looks at the processes and opportunities that can help learning from the experience and identifying future actions, reflection on those actions, and how to use these to develop further. E.g., 'What can I learn from or do differently next time'
60. More information can be found in GMC guidance "The reflective practitioner" <https://www.gmc.org.uk/education/standards-guidance-and-curricula/guidance/reflective-practice/the-reflective-practitioner---guidance-for-doctors-and-medical-students>
61. For further detailed understanding of reflection please go to: Faculty of Public Health: CPD Policy, and <https://www.fph.org.uk/professional-development/cpd/reflective-notes/>
62. An alternative set of questions that are helpful for reflection are:
- What was expected?

- What actually happened?
- Why is there a difference?
- What can be learnt?

63. Please note that reflection does not mean simply citing the words of the competency with little other detail, nor focussing solely on the work itself; it must reflect the competency in the context of the work. Remember, often what went wrong gives more learning than what went right, so be honest with yourself and the assessors.

Evidence

64. All evidence must demonstrate your personal role, but it is recognised that there may be pieces of work in which you have supervised others. In this case there must be a clear description of your role and responsibilities in this work and of the guidance given to those supervised, with supporting evidence.

65. Navigation is key; make this as easy as possible for the assessor. Highlight relevant points in your evidence to help the assessor find the specific piece of information which supports your claim, e.g., a decision noted in a set of minutes or the relevant text in a report. It is more important to cite clear evidence that supports your claims rather than provide a lot of evidence that does not support your role clearly.

66. Examples of evidence that can be accepted are:

- Reports for publication, reports to Boards, partners and other similar audiences, and reports about projects**, which clearly demonstrate your skills in relation to the competency claimed. Authorship should be clearly demonstrated. If you are not the author, then your respective roles and the author's must be clearly indicated. Reports can be useful but need precise signposting to be clear. If part of a report is used for evidence, then just that part needs be included (not the whole report).
- Chapters of larger publications, sections of longer reports, and other similar collaborative writing**. For example, a chapter of a complex Health Needs Assessment. Authorship must be clearly demonstrated, making your specific contribution clear.
- Presentations** to professional, lay, public or Board audiences, which you compiled and delivered.
- Project proposals, grant applications, Project Initiation Documents (PIDs)**, authored by you.
- Minutes of meetings**. Your contribution to the meeting should be highlighted. Handwritten notes of meetings are not acceptable. Presence only at a meeting is insufficient evidence to demonstrate competence, and agendas alone are not acceptable.
- Commissioned work**. Where you have commissioned other bodies, organisations, specialists, or other similar providers to do a particular piece of work that is being presented as evidence for a competency, evidence must be provided of your role in the commissioning process. For example, an authored project, specification document or proposal.
- Contemporaneous correspondence from other professionals** can support claims of, for example, joint working, effective leadership, recognition of expertise. If screenshots are used, then ensure authorship is clear if relevant to substantiating your claim
- Testimonials** can be used as evidence or to validate other evidence where otherwise it is not documented. Testimonials must be from someone senior to you, specific to the competency being claimed and verify your personal involvement in the work cited and competence as claimed. A testimonial

should only cover one competency and should be on UKPHR's Testimonial template. Testimonials should be completed by someone who is preferably a Public Health Specialist, but if they are not, this can be a senior colleague who can appropriately interpret the relevant competency. Note that Testimonials should only be used if there is nothing else available; they should be used sparingly.

67. Here are some crucial tips and suggestions for presenting your Show How evidence:

- a. Ensure the list of evidence in the narratives reflects that within the assessment proforma
- b. Ensure the evidence has consistent reference letters / numbers between the assessment proforma, the narratives and the filenames. Ensure all are included in submission
- c. If offering a report as evidence, then cite which page is relevant for that competency. Assessors will not search for the right page.
- d. Do not solely use final reports as evidence, as you need to show the assessor exactly what you did.
- e. Use minutes rather than agendas as evidence, otherwise how does the assessor know what relevance the agenda has to your role in the work cited, and did the meeting happen?
- f. Do a spell check on everything.
- g. If you cite "we" instead of "I" then how does the assessor know what you did?
- h. If using a testimonial, then ensure the person wrote it themselves, signed it, filled in their PH registration number (if they are registered), and used the UKPHR Testimonial template.
- i. If you use some Show How evidence for Know How competencies, then ensure this is clearly signposted in the Show Hows as well as the Know Hows, so the assessors can track.

Confidentiality

68. If assessors come across a breach of confidentiality in the portfolio, you will be required to redact the material constituting the breach. The breach of confidentiality will also result in an automatic requirement of a resubmission of KH8.f - even if already accepted.

69. Work details of colleagues need not be redacted but all personal details must be redacted as well as any details of members of the public, names of care homes and names of staff with whom the applicant had conflict.

Assessment of your portfolio

70. Once UKPHR has received your portfolio it will be checked in the office for completeness. If there are elements missing, it will be returned to you to address any outstanding areas. Any missing elements must be received within your 18-month deadline.

71. Once your portfolio is deemed complete, we will aim to assign the portfolio to two assessors within three months - although this could take longer if there is a backlog of portfolios and/or lack of assessor availability.

72. Each assessor completes an individual assessment and then agrees a joint recommendation. Assessors are senior public health professionals who volunteer their time to us, and a portfolio can take between 15 and 35 hours to assess. We aim to have assessors return the joint assessment to UKPHR within 12 weeks, but this could take longer.
73. The recommendation will be discussed at UKPHR's monthly Registration Panel, and their decision is ratified by UKPHR's Registration Approvals Committee. We will aim to keep you updated regarding the dates of these meetings, so you know when you might hear from us about a decision. We aim to notify you of your outcome within 3 working days of the Registration Approvals Committee.
74. Your assessment will have one of the following outcomes:
- a. All competencies have been achieved; this results in **registration**
 - b. **Clarifications** required. You have **6 months** from the date of feedback / outcome letter date to submit your clarifications. A clarification requires further explanation or additional evidence from work already submitted against that competence. Normally only one chance at clarification is allowed. Exceptionally, a second clarification may be requested where there are minor changes to be made to the portfolio. Additional work can be used, and an updated matrix and assessment proforma must be provided. You can opt to resubmit i.e., provide a completely new piece of work as evidence.
 - c. **Resubmissions** are required. This requires *a completely new piece of work* as evidence, although some original evidence may still be used to contribute if supporting the competency. You have **6 months** from the feedback / outcome letter date to submit your resubmissions. An updated matrix and assessment proforma must be submitted as well.
 - d. **Moderation** is required
 - e. The portfolio is **unassessable**. This happens when a portfolio cannot be assessed in its current form, usually due to poor navigation or narratives. If the Assessors think a portfolio is unassessable, a moderator must review a sample of the portfolio to confirm the judgement. You then have 18 months to re-submit a reorganised application.
 - f. The portfolio is a **complete return**. This means the applicant does not demonstrate competence in professional Public Health practice at the required level. If the assessors think you are not working at the right level, a moderator must review the entire portfolio to confirm the outcome. In this case, you would need to start the process again from the **beginning with a pre-application**, after a waiting period of **6 months after** the letter from the date of the outcome letter.
75. Remember, you have four attempts at submission. If you are not successful at the fourth attempt you must start the process again from the beginning with a pre-application, after a waiting period of 6 months after the letter from the date of your outcome letter.
76. It is very unusual for a portfolio to succeed after a first assessment, so don't be discouraged.

After the assessment

77. After each unsuccessful assessment, you are given the chance to meet virtually with your assessors so they can provide feedback on areas requiring improvement. UKPHR's office staff will arrange this meeting via Microsoft Teams, to take place

within 30 days of the outcome letter. You will be asked to provide questions you wish the assessors to answer beforehand and are welcome to ask a supervisor/mentor to join the meeting.

78. The feedback meeting with your assessors will brief you on what the issues are but not how to solve them. The meeting may be with both assessors, one acting as lead and the other acting as observer to help the conversation proceed smoothly. Occasionally a moderator may join the meeting.
79. UKPHR staff will start and record the meeting. This is for use only by the assessors- the recording will not be shared with you notes will be taken and shared with you.
80. Remember, the deadline for clarifications and resubmissions will be 6 months from the date of your feedback meeting. If the offer for a feedback meeting is not taken up or it is not scheduled on time, the 6-month time window will apply from the date of the outcome letter.
81. You should not correspond with your assessors beyond your feedback meeting. For example, you should not send your assessors any draft clarifications or resubmissions for their views before formal submission to UKPHR.

Making further submissions

82. If you are required to submit clarifications or resubmissions, you must submit an updated assessment proforma and matrices to aid clear signposting of additional or new evidence. Please retain electronic copies of these documents in addition to your assessment proforma.
83. To ensure a clear audit trail we strongly advise that you update the proforma and matrices in different coloured font at each stage and leave the text you'd previously included within the document. For example:
 - BLACK font for the initial portfolio submission.
 - BLUE font for the second submissions
 - GREEN font for the third submissions
 - RED font for the fourth and final submission to UKPHR
84. Please follow the same guidance regarding the format and posting/emailing materials as you did for your first submission.
85. If you think you may miss a deadline due to [exceptional circumstances](#), you can apply for an extension - please contact register@ukphr.org. The UKPHR Registrar has the discretion to authorise extensions up to six months each on two occasions and exceptionally.
86. If the clarifications or resubmissions are not received within the allotted time, whether there is an extension or not, they cannot be accepted. The Registration Approvals Committee, chaired by the Registrar will ultimately decide whether you are provided additional time. The Committee may decide not to provide additional time and your assessment will stop.
87. If you decide not to proceed further with your application at any point, please notify us via email so that we can notify your assessors and stop your assessment.

Withdrawal of your application

88. You may withdraw your portfolio at any time after submitting it for assessment. If you do decide to withdraw, no refund will be issued if the assessment has started. If the assessment has not started when you notify us of withdrawal, we can refund your portfolio from minus a £100 administration fee.
89. If you decide to resubmit your portfolio after withdrawing it, you can only resubmit this up to the portfolio deadline date listed on your preapplication approval letter. If you want to resubmit after this date, you must make a new pre-application first.

The Appeal process

90. UKPHR's appeals process is published on the [UKPHR's website](#). Appeals can only be made on process issues; they cannot be used to question a decision.
91. An appeal must be submitted in writing by the applicant to the Registrar and must be received within 20 working days of the date of the decision appealed against.

Quality Assurance

92. A team of moderators help ensure that assessment standards and processes are
- Appropriate
 - Consistent
 - Fair
 - Objective
 - Robust
 - Valid
 - In line with UKPHR policy
93. Moderators also assist with the **interpretation of competencies** and provide **support** for assessors. Moderators cannot overturn assessors' decisions, only the Registration Panel can do so. However, Moderators do have the right to be heard, and their views are considered by the Panel.
94. The Registration Panel also provides additional quality assurance. It is chaired by experienced assessors and meets every month to consider each application and its outcome, providing supportive but rigorous challenge through peer review by other assessors in attendance and a moderator. The decisions of the Panel are ratified by the Registration Approvals Committee, chaired by the UKPHR Registrar.

Hints and tips

95. It is important to understand some of the trends we've identified since the inception of the SRbPA route. Here are some **frequent reasons why applications are not successful**:
- Each element of the competency is not addressed.
 - Lack of clear objective evidence of your role, e.g., minutes citing your name but no action / role, agendas of meetings but no minutes, reports without your name as the author.
 - Telling the story of the work with little reference to the competency being claimed. The assessors are looking for the competency, not the story of the work. So put on the 'glasses' of the assessor.
 - Telling the story of the work but not your role in it.
 - Poor navigation between the competency and its evidence which means assessors struggle to understand where and how your evidence fits the

competency. Use a clear referencing system and page markers for your evidence

- Work or learning does not meet currency requirements. For example, understanding the arrangements for health protection prior to 2013 is insufficient given the major reorganisation in England, so this would impact your ability to meet both Know How and Show How competencies if you are based in England. Beware several competencies have the word **current** within, so this means the current situation and best practice
- Poor or missing reflections. Assessors want to see what you have learnt from the work, what you would do differently, and how you have identified any further development where appropriate.
- Not using the narrative template.

96. Some helpful **comments from previous applicants**:

- Read the guidance document. Then read it again.
- Clarify your understanding of the competencies e.g., with a Public Health trainer before starting.
- Wear your “Assessor glasses” when writing your narratives, i.e. how does the work fit the competency, rather than just writing about the work.
- Spend less time chasing past evidence if difficult and instead move forward to do refresher course/ top up training/ private study.
- Avoid doing portfolio in a period of great change in your life.
- The time commitment is at least 10 hours a week for 2+ years, and many applicants are already doing a difficult job if at the right level.
- Ask someone who has been through a UKPHR portfolio registration process to read your application form, matrix and portfolio summaries before submission and ask for honest feedback on your drafts.
- Self-evaluation and good self-reflection are an essential part of the process.
- Make sure you are comfortable with other people reading and assessing your work, being questioned about why you did something, or covering old ground.
- If you do your Know Hows first, make sure you go back and review after you set out your Show Hows, as you will have considered how knowledge is applied, and this may change the way you want to frame things.
- Work through your evidence as you are writing your Show Hows - don't wait until the end to gather your evidence. Put it in an electronic folder as you go along. Work out an evidence navigation system early on.
- Feedback on your assessment can be a real challenge and create some confusion. Be open to receiving constructive criticism.
- Become a local assessor for a UKPHR Practitioner Registration scheme as this can help you understand how portfolios are approached by assessors.
- Think about quality of evidence, rather than quantity. Try to only include evidence that is truly relevant to what you are claiming.
- Write concisely and succinctly; this is required in a consultant role so you will be expected to show this ability.
- Difficult navigations or unjustifiable claims make assessment extremely difficult for assessors- keep them on your side!

97. In the interest of **environmental sustainability** and ease of assessment, please:

- a. Use either 11 or 12 font size
- b. Photocopy/print on both sides when paper copies are required.
- c. Minimise the use of plastic wallets.
- d. Do not duplicate evidence but use an effective navigation reference system.

Annex 1 – amendments made to this document

Updates made December 2024:

- Portfolio assessment timescale now 12 weeks
- Use of testimonials for Know How competencies
- Number of assessments per portfolio has increased to 4 (with a fee payable for each assessment)
- If applicant has passed DFPH exam in last 10 years before portfolio submission, they should note that Know How competencies containing the word 'current' will require evidence of learning of the current situation.
- If a portfolio is deemed unassessable, the applicant will not receive a refund of their assessment fee.
- Applicants do not need to have gained competencies in the UK: removal of requirement that applicants must have gained some of their competencies in the UK.

Updates made March 2025:

- The term current has been removed from Know How competencies KH1.e, KH2.B, KH3.C, KH6.J, KH6.k, KH7.h, KH8.f.
- Clarification has been made for those who have passed the Diplomate exam as to when they will be expected to provide additional evidence for Know Hows with the term 'current' in (this is required if their portfolio is submitted more than 5 years after DFPH exam pass date).

Update made April 2025:

- Testimonial author requirements have been amended.
- Clarification of currency requirements and parental leave.