



## **Saving your QA Tools**

To save each tool, ensure you click on each blue tab (“Self Assessment”, “Learning Plan” and “Learning Record”)

Please note that this demonstration is using a PC computer and Google Chrome.



## **Welcome to the Professional Development Tools!**

### **Instructions:**

Across the top are three tabs: Self-Assessment, Learning Plan and Learning Record. Together, these are the Professional Development tools.

- To access the tools, click on the blue tab of the tool you wish to access
- Read the instructions
- Click the blue [“Click here to begin”](#) link

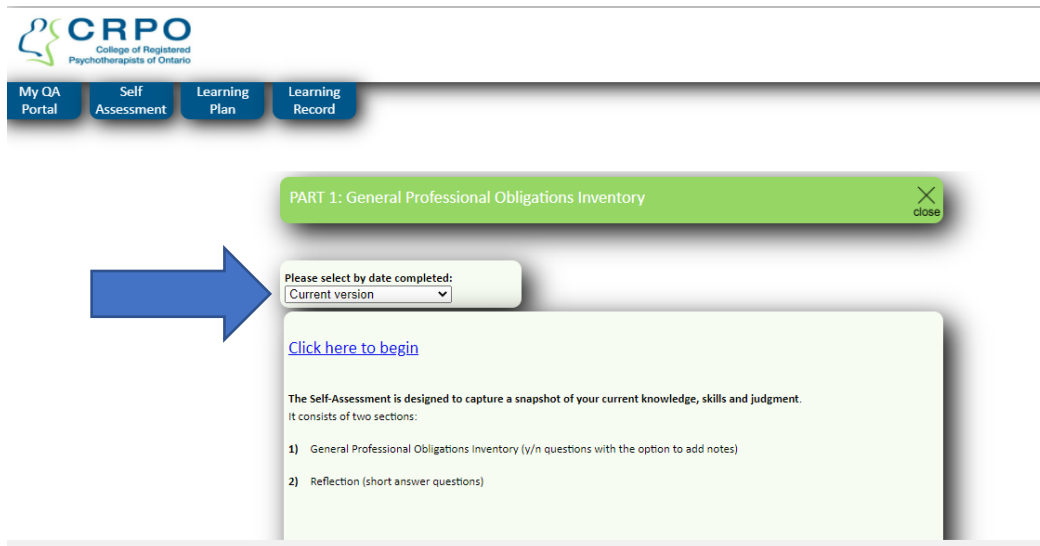
**Remember to save your work frequently to avoid lost data!**

## **Part 1: Saving your Self Assessment**

## **Part 2: Saving your Learning Plan**

## **Part 3: Saving your Learning Record**

## Part 1: Saving your Self Assessment



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College of Registered  
Psychotherapists of Ontario

My QA Portal   Self Assessment   Learning Plan   Learning Record

**PART 1: General Professional Obligations Inventory** close

Please select by date completed:  
Current version

[Click here to begin](#)

The Self-Assessment is designed to capture a snapshot of your current knowledge, skills and judgment. It consists of two sections:

- 1) General Professional Obligations Inventory (y/n questions with the option to add notes)
- 2) Reflection (short answer questions)

1. Click on the Dropdown menu under **“Please select by date completed”**. This will allow you to open previously submitted tools. If you click **“Click here to begin”**, this will take you to the current tool that is in progress, or to start a new tool.
2. Once you are in the correct tool that you want, you will see this screen:



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My QA Portal   Self Assessment   Learning Plan   Learning Record

**PART 1: General Professional Obligations Inventory** close

Please select by date completed:  
08-18-2020 Completed Assignment (read-only)

**Legal and professional obligations**


**Q:** I understand and apply my professional obligations described in CRPO's Code of Ethics.

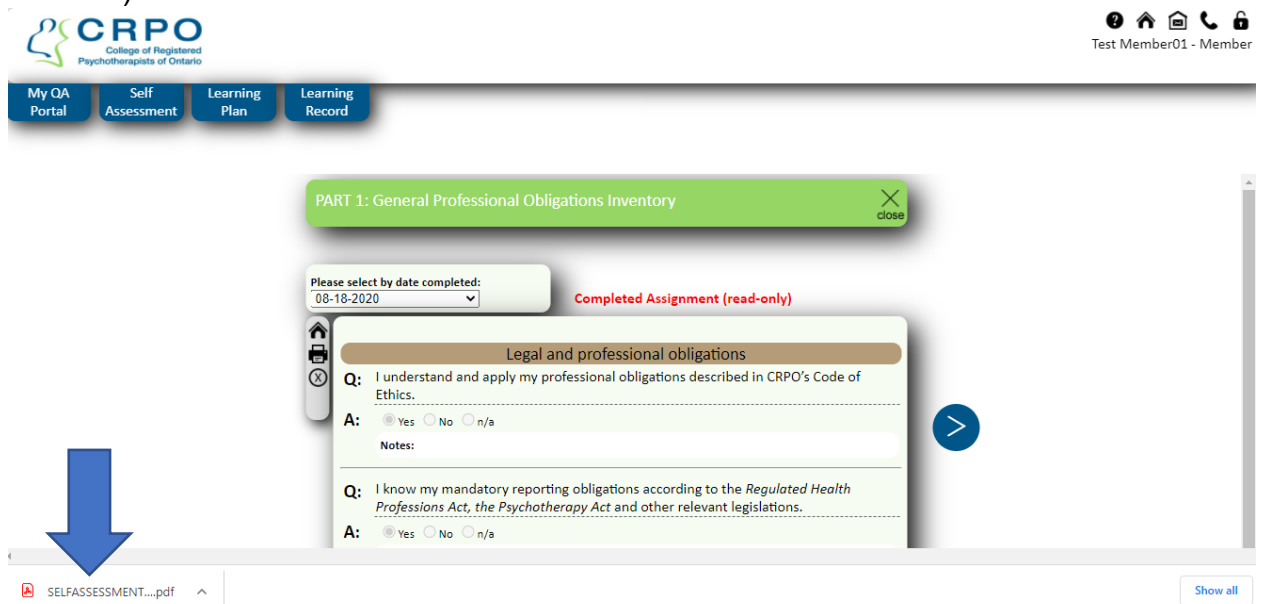
**A:** ☒ Yes ☐ No ☐ n/a

**Notes:**

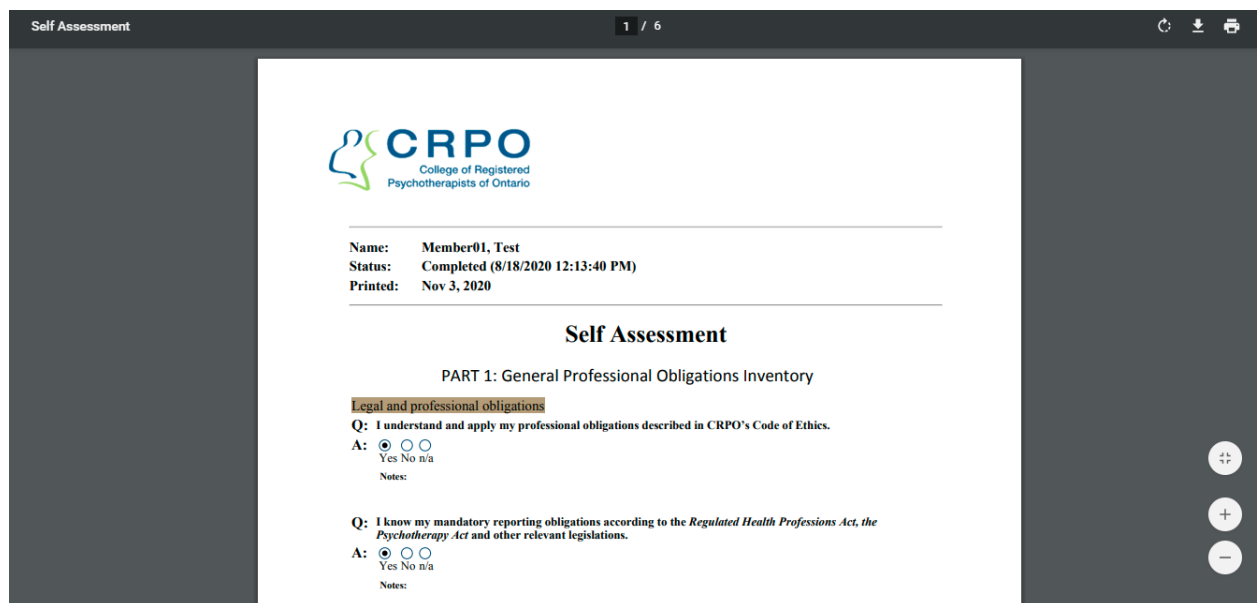
**Q:** I know my mandatory reporting obligations according to the *Regulated Health Professions Act, the Psychotherapy Act* and other relevant legislations.

**A:** ☒ Yes ☐ No ☐ n/a

- Click on the **Print** icon  that you see on the left. The PDF document will take a few minutes to load.
- The downloaded document will appear on the bottom of your screen, or a download alert will come up on your computer (this example is using Google Chrome).



- When you click on it, the PDF should upload like this:

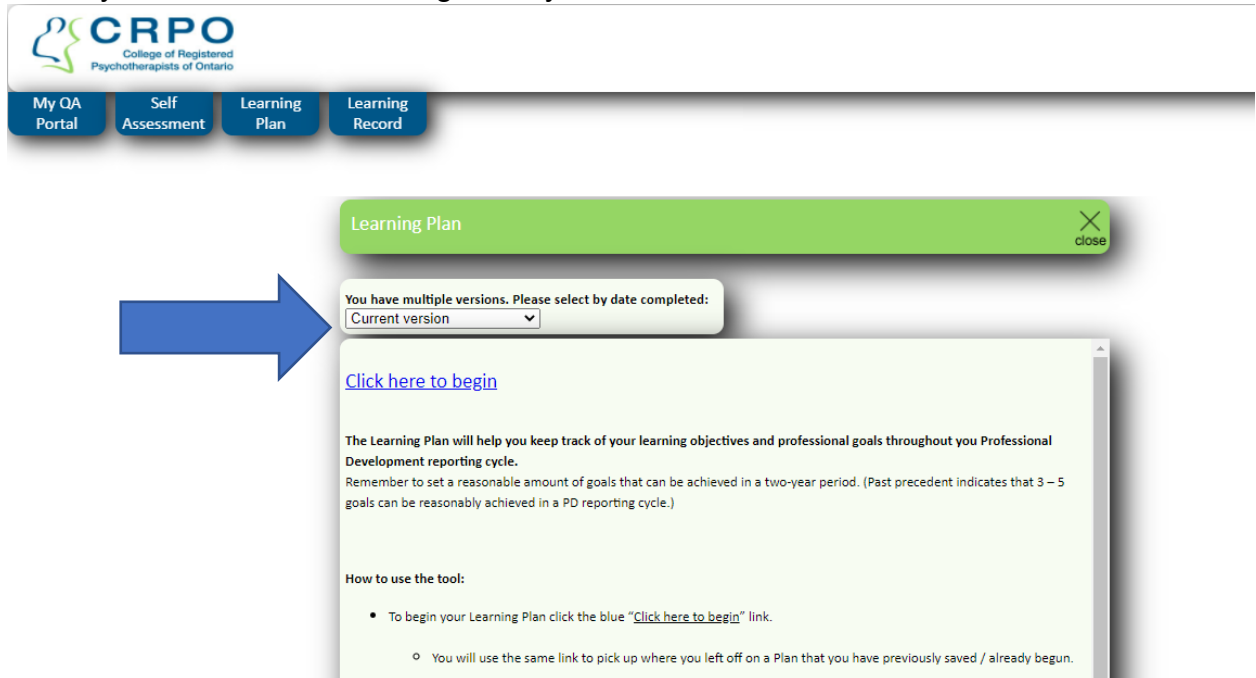


- Please make sure to save this document somewhere on your computer that you can find easily.

7. You can repeat these same steps if you are wishing to save a current Self Assessment in progress before you submit it.


## Part 2: Saving your Learning Plan

1. When you click on the Learning Plan, you will see this screen:



2. Click on the “**Current version**” dropdown to get to the submitted Learning Plan you want. If you “**Click here to begin**”, this will take you to a current in-progress Learning Plan or a new one.

3. When you choose the correct Learning Plan, you will be directed to this page:



My QA Portal   Self Assessment   **Learning Plan**   Learning Record

Learning Plan

You have multiple versions. Please select by date completed:

Completed Learning Plan is read-only


+ Goal #1

My Goal  
 I know my mandatory reporting obligations according to the Regulated Health Professions Act, the Psychotherapy Act and other relevant legislations.

Action Plan  
 I will review the relevant legislations.

Reflection  
 I have reviewed and reflected on my reporting obligations for future reference.

4. You have a few options for how to print this.



Learning Plan close

You have multiple versions. Please select by date completed:

Learning Plan completed: 11/5/2020 is read-only

+ Goal #1 Goal met

My Goal  
 I know when my professional limitations require that I seek clinical supervision and/or consultation with a colleague.

Action Plan  
 Arrange for monthly clinical supervision sessions.

Reflection  
 Scheduling monthly sessions was more helpful

a. Click on the **Print** icon  that you see on the left.

Learning Plan completed: 11/5/2020 is read-only

+ Goal #1 Goal met

**My Goal**

I know when my professional limitations require that I seek clinical supervision and/or consultation with a colleague.

**Action Plan**

Arrange for monthly clinical supervision sessions.

**Reflection**

Scheduling monthly sessions was more helpful

+ Goal #2 In progress

**My Goal**

I know the specific client details that must be documented in the client record (e.g. full name, address, contact number).

**Action Plan**

Create template notes that provide space for client details that must be documented

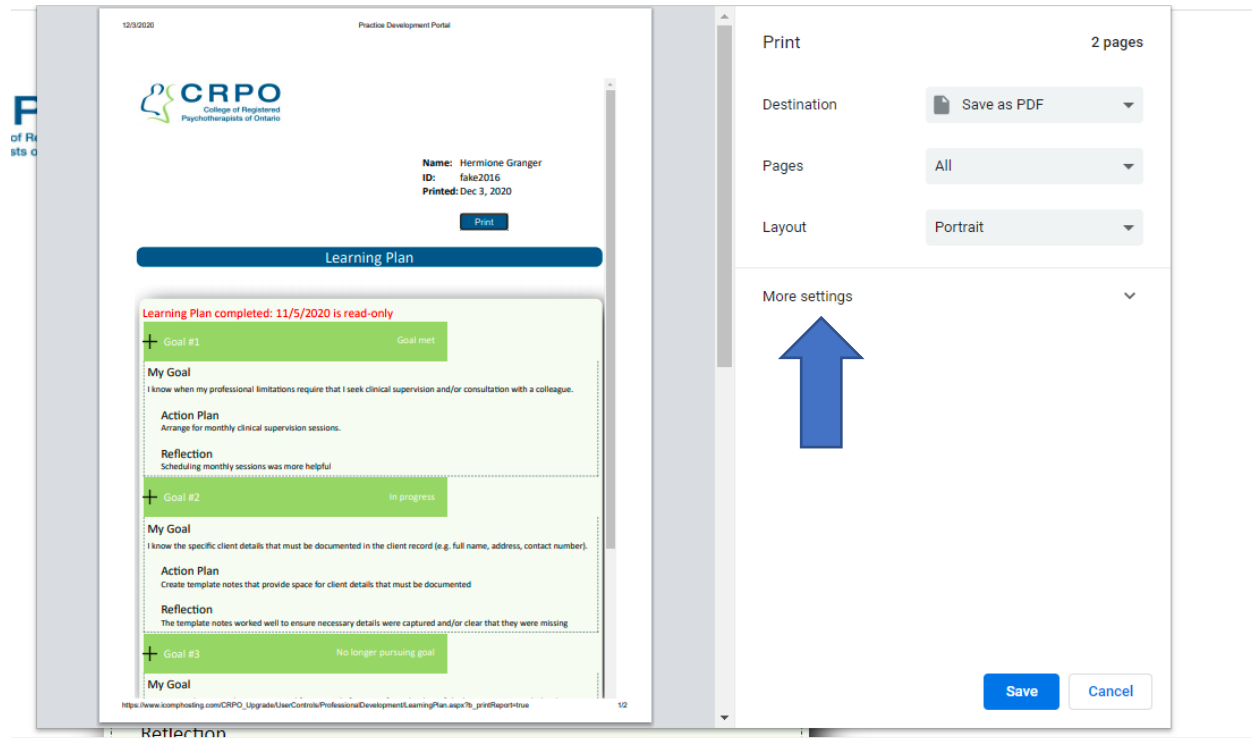
Name: Hermione Granger

ID: fake2016

Printed: Dec 3, 2020

Print

Then click on the blue **Print** tab on the right side.



The screenshot shows the CRPO Practice Development Portal interface. On the left, the Learning Plan is displayed with three goals. On the right, the Print settings menu is open, showing options for Destination (Save as PDF), Pages (All), Layout (Portrait), and More settings. A blue arrow points to the 'More settings' option.

12/3/2020 Practice Development Portal

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Name: Hermione Granger  
ID: fake2016  
Printed: Dec 3, 2020

Print

Learning Plan

Learning Plan completed: 11/5/2020 is read-only

+ Goal #1 Goal met

**My Goal**  
I know when my professional limitations require that I seek clinical supervision and/or consultation with a colleague.

**Action Plan**  
Arrange for monthly clinical supervision sessions.

**Reflection**  
Scheduling monthly sessions was more helpful

+ Goal #2 In progress

**My Goal**  
I know the specific client details that must be documented in the client record (e.g. full name, address, contact number).

**Action Plan**  
Create template notes that provide space for client details that must be documented

**Reflection**  
The template notes worked well to ensure necessary details were captured and/or clear that they were missing

+ Goal #3 No longer pursuing goal

**My Goal**

https://www.iconphosting.com/CRPO\_upgrade/UserControls/ProfessionalDevelopment/LearningPlan.aspx?b\_printReport=true 1/2

Print 2 pages

Destination Save as PDF

Pages All

Layout Portrait

More settings

Save Cancel

You may need to adjust the scale of your print settings. Click on “**More settings**”

More settings ^

Paper size Letter ▼

Pages per sheet 1 ▼

Margins Default ▼

Scale Default ▼

Options

- ☒ Headers and footers
- ☒ Background graphics

Save Cancel



Under **“Scale”**, click on the **“Default”** tab. Then click **“Custom”**.

More settings ^

Paper size Letter ▼

Pages per sheet 1 ▼

Margins Default ▼

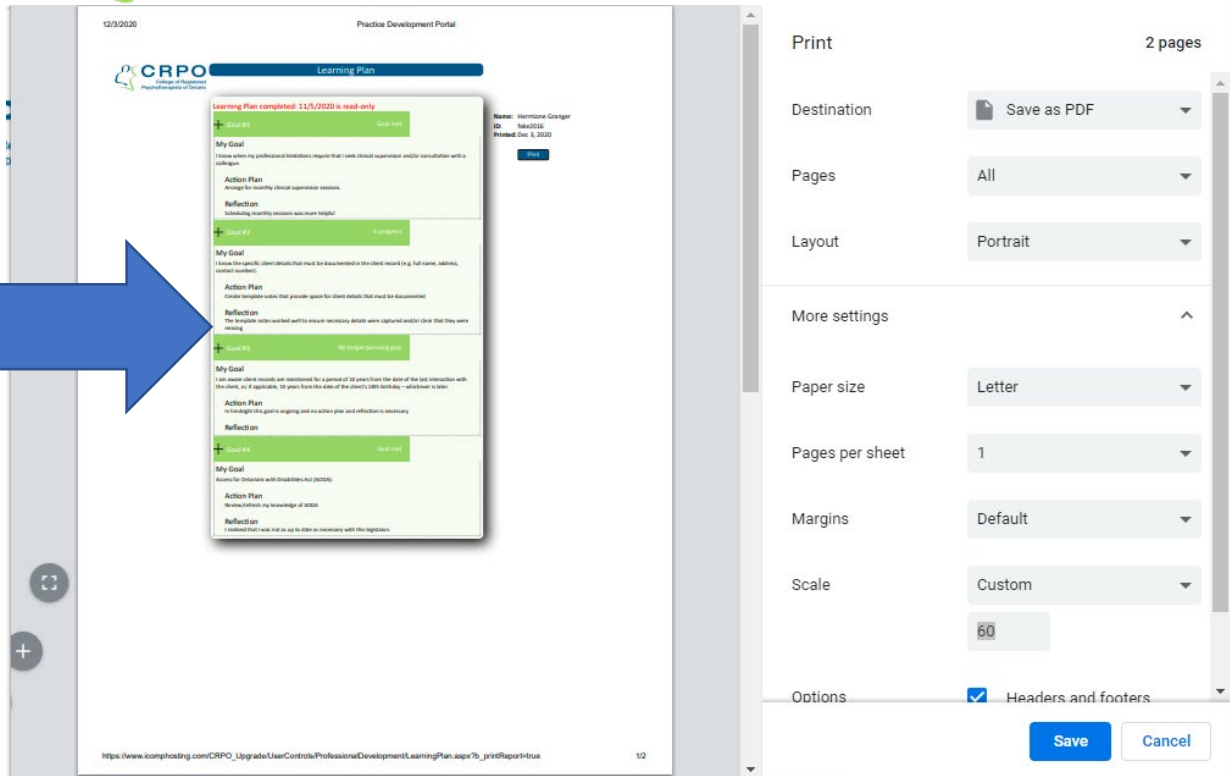
Scale Custom ▼

60

Options ☒ Headers and footers

Save Cancel

Change the number to **60**.



The screenshot displays the CRPO Practice Development Portal. The main content area shows a 'Learning Plan' for a user named 'Harrison George'. The plan is titled 'Learning Plan completed: 11/1/2020 is read-only'. It lists several goals, each with a 'My Goal' section, an 'Action Plan' section, and a 'Reflection' section. A large blue arrow points from the Learning Plan content to the print settings sidebar on the right.

The print settings sidebar on the right includes the following options:

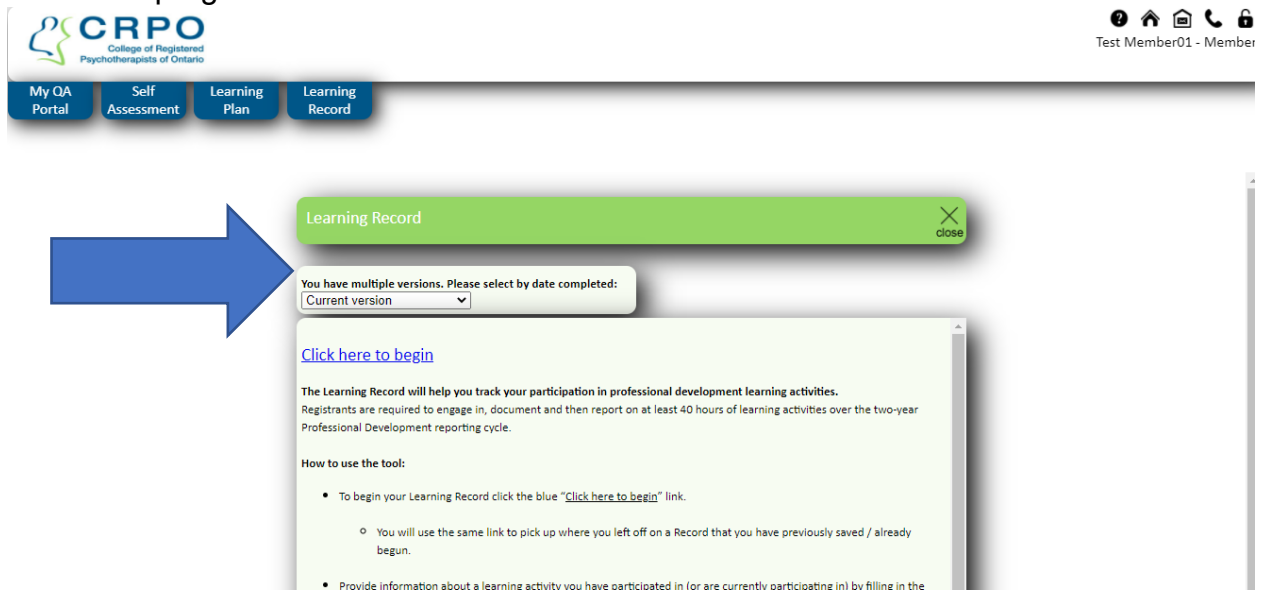
- Print**: 2 pages
- Destination**: Save as PDF
- Pages**: All
- Layout**: Portrait
- More settings**:
  - Paper size**: Letter
  - Pages per sheet**: 1
  - Margins**: Default
  - Scale**: Custom (60)
- Options**: ☒ Headers and footers
- Buttons**: Save, Cancel

Now you will see that all of the goals appear on one page.

- b. Take a screenshot of this page. You can do this in several different ways, depending on what computer you are using. One option on a PC is to use the “**Snip & Sketch**” tool. On a Mac computer, press and hold these three keys together: **Shift, Command, and 3**.
5. You can repeat these steps to save a current in-progress Learning Plan.

### Part 3: Saving your Learning Record

1. Either click the dropdown under “**Current version**” to go to a previously submitted Learning Record, or click “**Click here to begin**” to go to a Learning Record in-progress.



**Learning Record** [close]

You have multiple versions. Please select by date completed:  
Current version

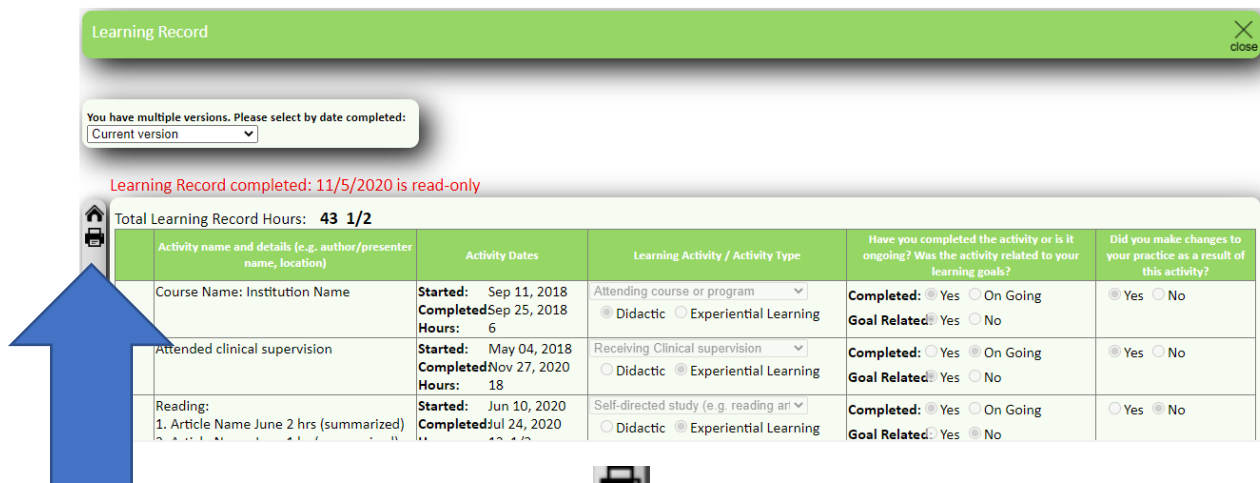
[Click here to begin](#)

The Learning Record will help you track your participation in professional development learning activities. Registrants are required to engage in, document and then report on at least 40 hours of learning activities over the two-year Professional Development reporting cycle.

How to use the tool:

- To begin your Learning Record click the blue “Click here to begin” link.
  - You will use the same link to pick up where you left off on a Record that you have previously saved / already begun.
- Provide information about a learning activity you have participated in (or are currently participating in) by filling in the

2. You have a few options for how to print this.



**Learning Record** [close]

You have multiple versions. Please select by date completed:  
Current version

Learning Record completed: 11/5/2020 is read-only

Total Learning Record Hours: **43 1/2**

Activity name and details (e.g. author/presenter name, location)	Activity Dates	Learning Activity / Activity Type	Have you completed the activity or is it ongoing? Was the activity related to your learning goals?	Did you make changes to your practice as a result of this activity?
Course Name: Institution Name	Started: Sep 11, 2018 Completed: Sep 25, 2018 Hours: 6	Attending course or program Didactic <input checked="" type="radio"/> Experiential Learning <input type="radio"/>	Completed: <input checked="" type="radio"/> Yes <input type="radio"/> On Going Goal Related: <input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Attended clinical supervision	Started: May 04, 2018 Completed: Nov 27, 2020 Hours: 18	Receiving Clinical supervision Didactic <input type="radio"/> Experiential Learning <input checked="" type="radio"/>	Completed: <input type="radio"/> Yes <input checked="" type="radio"/> On Going Goal Related: <input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Reading: 1. Article Name June 2 hrs (summarized)	Started: Jun 10, 2020 Completed: Jul 24, 2020	Self-directed study (e.g. reading an Didactic <input type="radio"/> Experiential Learning <input checked="" type="radio"/>	Completed: <input checked="" type="radio"/> Yes <input type="radio"/> On Going Goal Related: <input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

- a. Click on the **Print** icon  that you see on the left.

Learning Record
✕ close

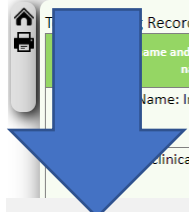
You have multiple versions. Please select by date completed:

Current version ▼

Learning Record completed: 11/5/2020 is read-only

Record Hours: **43 1/2**

Name and details (e.g. author/presenter name, location)	Activity Dates	Learning Activity / Activity Type	Have you completed the activity or is it ongoing? Was the activity related to your learning goals?	Did you make changes to your practice as a result of this activity?
Name: Institution Name	Started: Sep 11, 2018 Completed: Sep 25, 2018 Hours: 6	Attending course or program ▼ <input checked="" type="radio"/> Didactic <input type="radio"/> Experiential Learning	Completed: <input checked="" type="radio"/> Yes <input type="radio"/> On Going Goal Related: <input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Clinical supervision	Started: May 04, 2018 Completed: Nov 27, 2020 Hours: 18	Receiving Clinical supervision ▼ <input type="radio"/> Didactic <input checked="" type="radio"/> Experiential Learning	Completed: <input type="radio"/> Yes <input checked="" type="radio"/> On Going Goal Related: <input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No



LEARNINGRECOR....pdf

It will download a PDF for you on the bottom of the screen in a few seconds. Open this document and save it to your computer.

- a. Take a screenshot of this page. You can do this in several different ways, depending on what computer you are using. One option on a PC is to use the “**Snip & Sketch**” tool. On a Mac computer, press and hold these three keys together: **Shift, Command, and 3**.
3. You can repeat these steps to save a current in-progress Learning Record.

If you have any questions about these instructions, please contact [ga@crpo.ca](mailto:ga@crpo.ca)