REGISTRATION TRAINING PORTFOLIO V5.0

OneFile User Guide for ***Candidates*** *and* ***Trainers***

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ABOUT THIS VERSION

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Welcome to OneFile

Using this guide

This guide gives an overview of the system and provides step-by-step guidance on completing necessary tasks. The guide should be used together with other resources to become familiar with systems use.

What is OneFile?

OneFile is a digital portfolio system that:

- Collects and organises digital evidence of a candidate's skills and knowledge
- Tracks the evidence against the HCPC's regulatory standards of proficiency (SoPs)
- Supports workflows between different types of users
- Allows the collected evidence to be assessed
- Replaces a paper portfolio

User roles and responsibilities

Evidence is collected, marked and verified digitally through OneFile by a range of different user roles. The diagram opposite summarises how each uses the system. It is important to note that OneFile sits within a local training environment. The training team is responsible for deciding:

- **Structure** and **timing** of the assignment of assessments
- **What** evidence is to be submitted **when**
- **Format** and method of **evidence submission**
- Required **depth** of **feedback** and comments
- Content, frequency, scope and timing of any **progress review meetings**

Candidate

- Gathers evidence against the SoPs
- Gives and responds to feedback and comments from training team
- Signs off assessments when complete

Verifier

- Scrutinises the evidence across the portfolio
- Determines whether the SoPs are demonstrated in the evidence
- Completes the verifier report form on OneFile at the end of verification

Default trainer
Additional trainers

- Assigns assessments to candidates via training plans
- Reviews and gives feedback on evidence submitted
- Determines which SoPs the evidence meets
- Signs off assessments when complete
- Completes the laboratory feedback form on OneFile at the end of verification

Observer

- Has read-only access to the portfolio

Overview process

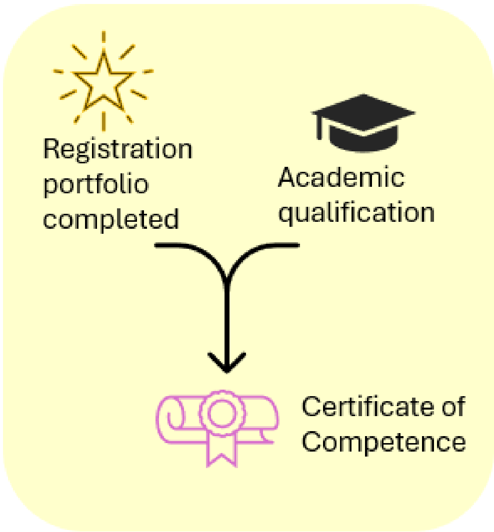
The use of OneFile follows a process whereby training is assigned, evidence collected and marked and finally scrutinised. The diagram below illustrates this overview.

The portfolio of evidence is complete when it contains a set of assessments containing evidence that meets all the required HCPC SoP.

At this point an application can be made to have the portfolio scrutinised by an external verifier.

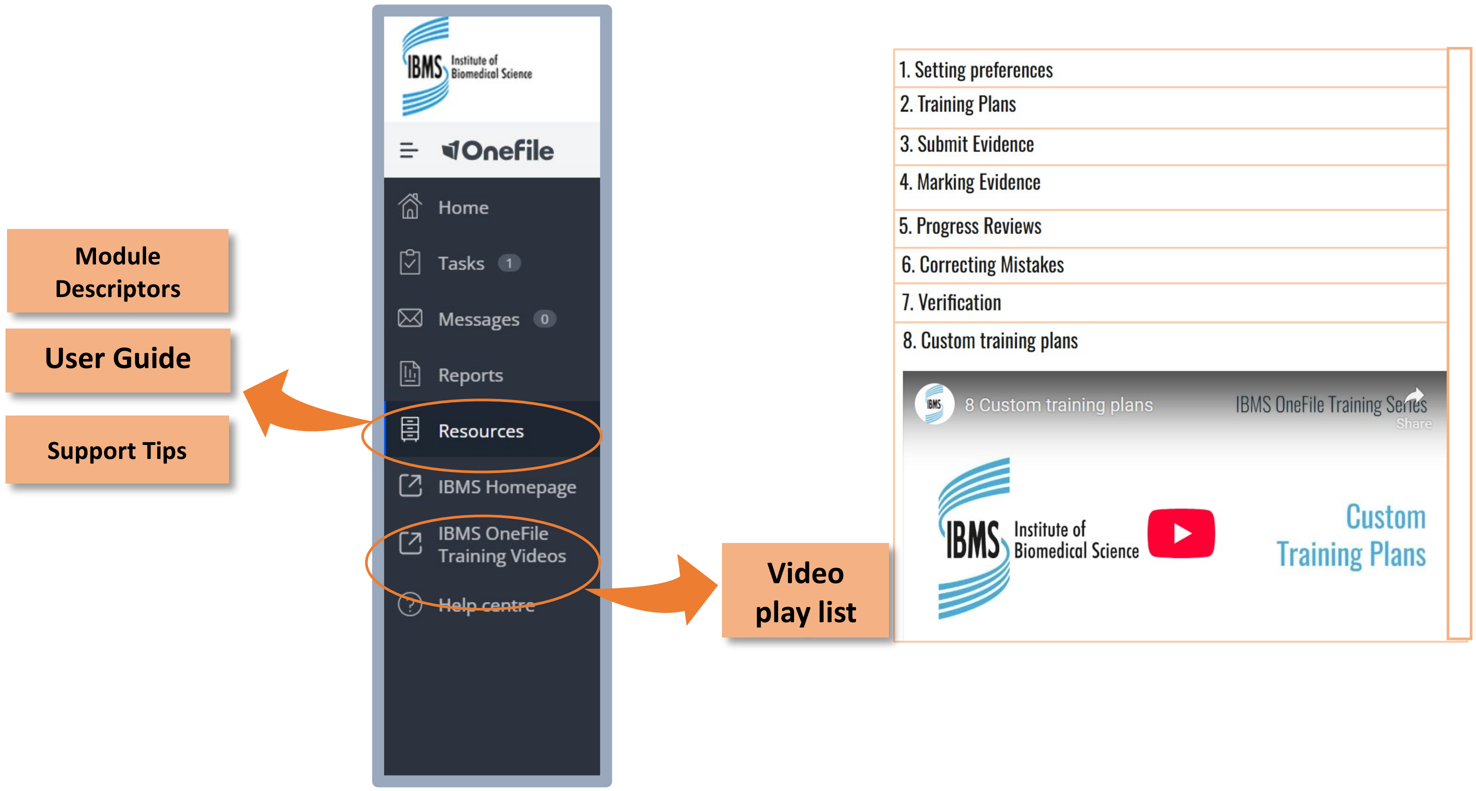
This scrutiny and all verification 'paperwork' happen within OneFile.

Following successful verification, the digital portfolio is archived. Read-only access to it is retained by the candidate, trainer and any other associated users.



Where to find training resources

All training resources for OneFile are available from within the system itself, as shown below, and on the IBMS website.



To request help with system features and functions please email elearning@ibms.org

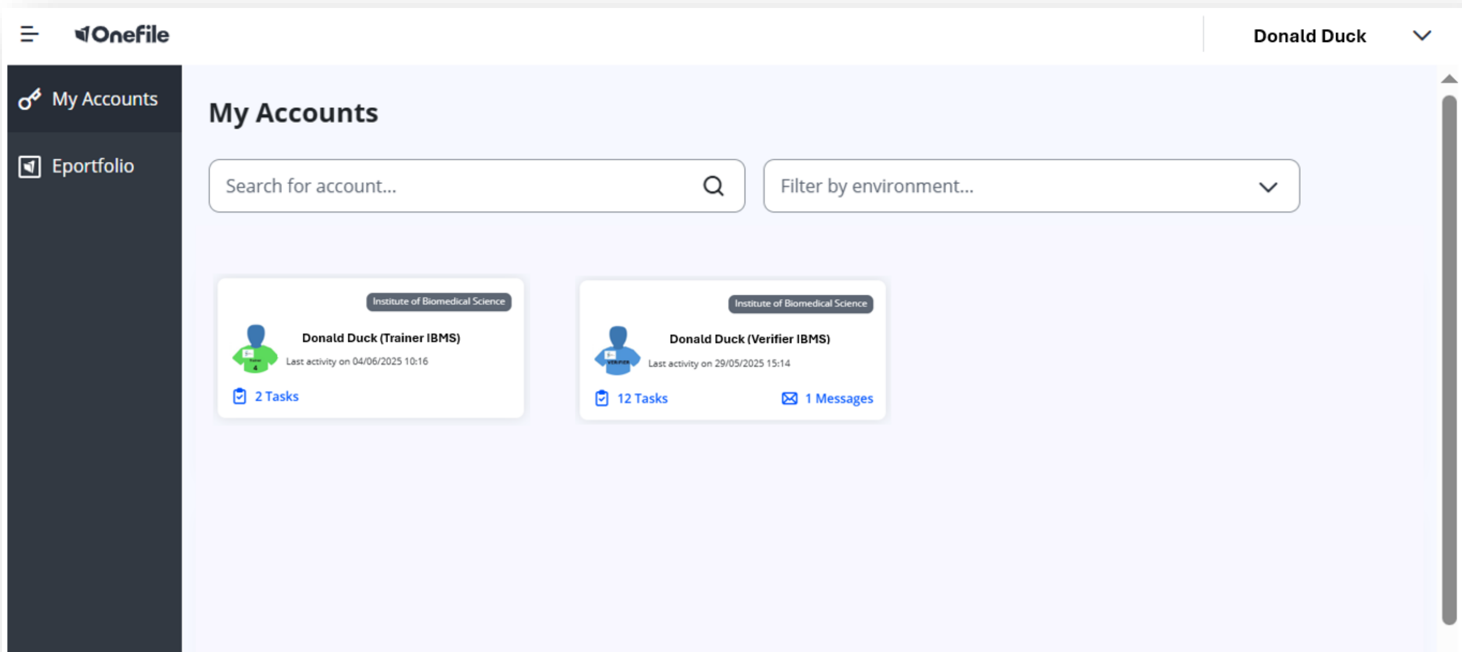
1 Getting started

1.1 Keychain account

Access to OneFile is made up of two parts: (1) a keychain account, and (2) a user profile. The OneFile Keychain is a feature that links all OneFile profiles associated with the same email address. If you apply for a different role on OneFile, and are an existing user, your new profile is added to your existing keychain account.

If you use OneFile in more than one role — for example, as both a **trainer and a verifier** — your keychain will allow you to switch between profiles without needing separate logins.

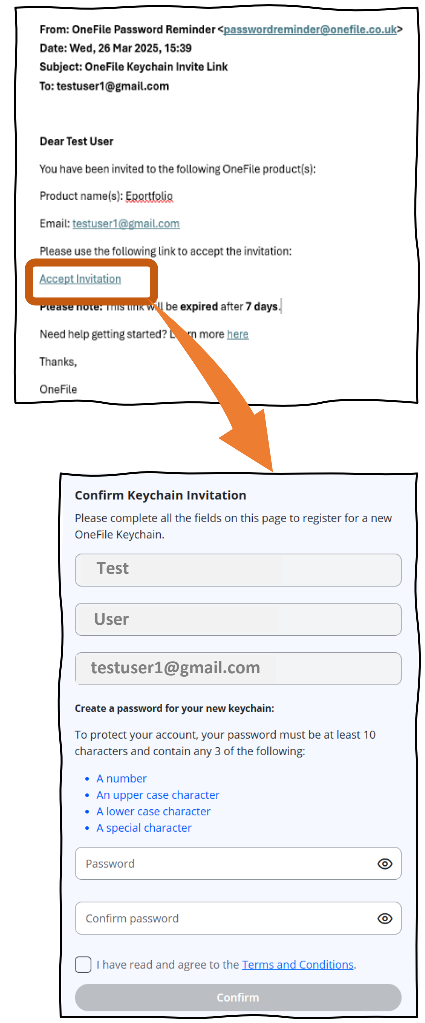
If you have more than one profile, always select the one you intend to use from the OneFile landing page:



1.2 Logging in

Only the person who has applied for the portfolio will receive an email from registration@ibms.org when any new accounts associated with the application have been set up on OneFile. The candidate will always be a new account and new trainer accounts may also have to be created.

An email is sent automatically **from OneFile** to new users when a new account is created. **This email is sent to the email address provided on the application form.**



⚠	**Emails may go to Spam/junk folders** **Links are time limited. Please action on receipt**

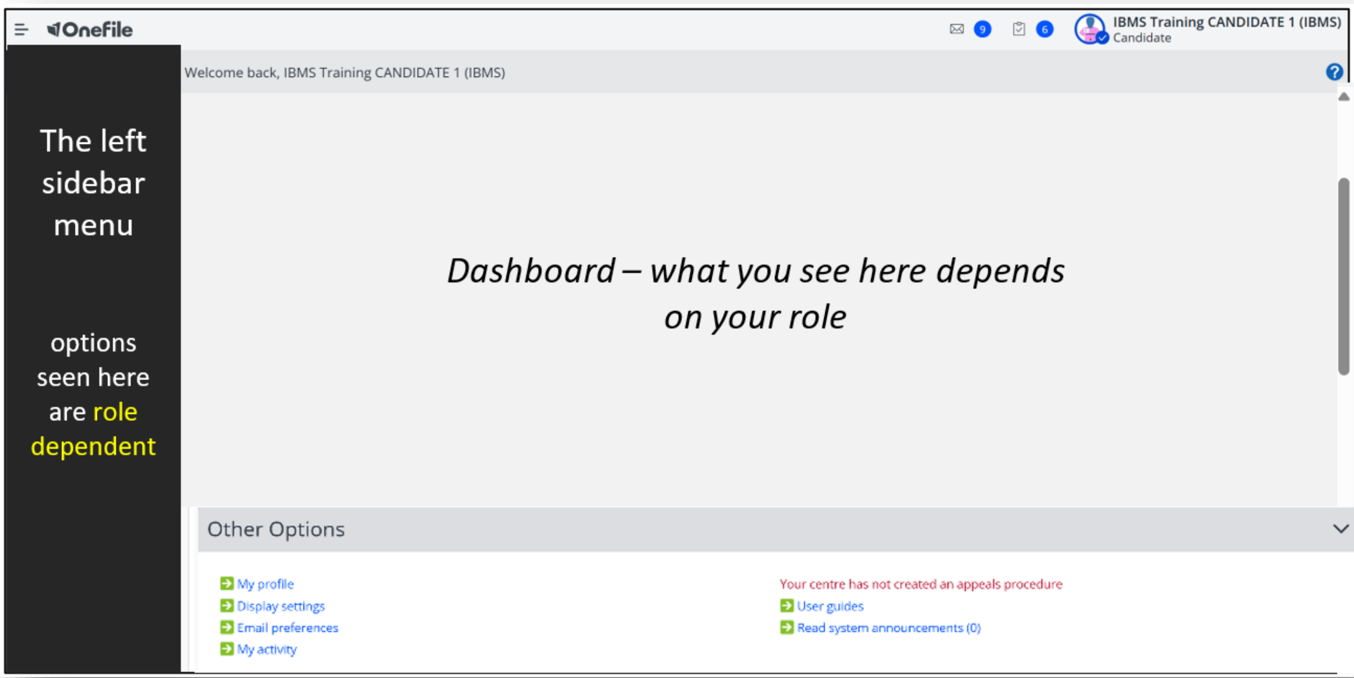
1. Check your inbox for the keychain invitation email
   If your invitation link has expired, please contact elearning@ibms.org to request a new link.
2. Click the accept link to set your password
3. Enter your registered email address

   This creates your keychain account, your IBMS profile and links both together via the email address
4. Log in at https://login.onefile.co.uk
5. Enter your **email** and **password**
   The OneFile landing page shows the profiles associated with your email address.
6. Select the required profile to be taken to the **Home page** for that profile.
7. Accept the Terms & Conditions
8. Review any system announcements

1.3 Navigation

1.3.1 The Home page

- The layout differs depending on your role (Candidate, Trainer or Verifier), but the core features and icons remain consistent.
- You can return to your home page view at any time by clicking **Home** in the **left side menu**.
- Once you have logged into OneFile, the **Dashboard** is your main workspace.
- If you have more than one profile, always select the appropriate one from the **OneFile landing page** to ensure you access the correct homepage

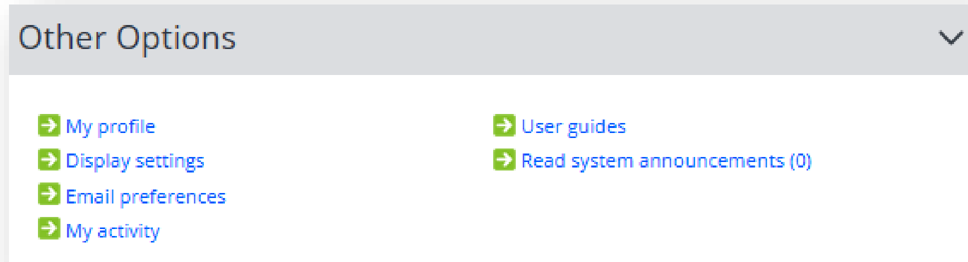


1.3.2 Other options

▶ **REFER TO TRAINING VIDEO 1**

At the bottom of your dashboard, you will find the **Other Options** area.

This section of the home page contains useful tools that allow you to customise your account, **manage your notifications,** and review your activity.



- **My Profile**
  See Section 1.6.

- **Display settings**
  Change how OneFile looks on your screen.
  To suit your preferences or accessibility needs., you can adjust:

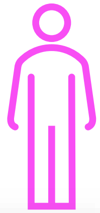
  a) text size
  b) contrast settings
  c) colour schemes

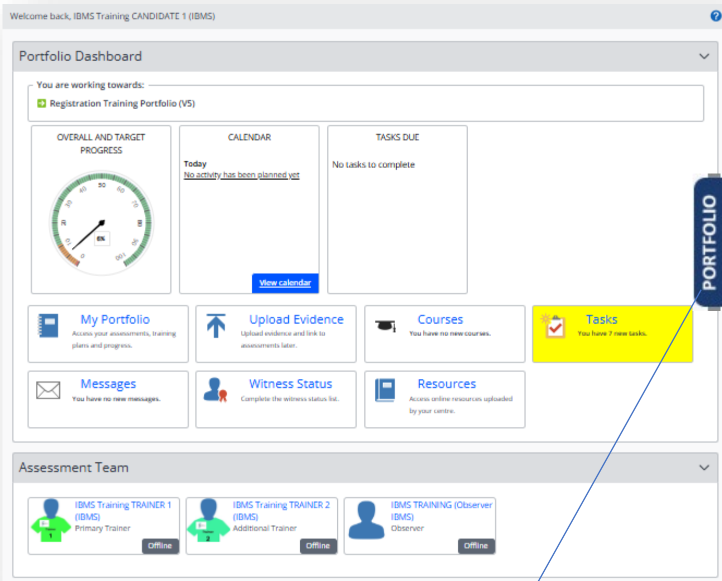
- **Email preferences**
  Choose how you want to receive notifications from OneFile. See Section 1.6 for more information.

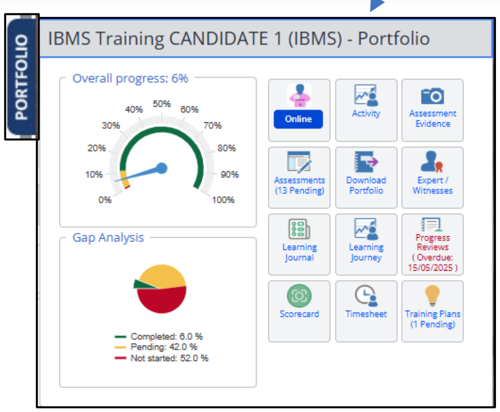
- **My activity**
  View a log of your recent activity within the platform. This is helpful for tracking actions you've taken, such as submitting evidence or completing forms.

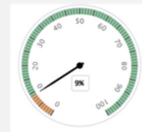
- **Read system announcements**
  Access important updates from OneFile or IBMS. A notification number will appear here if there are new messages you haven't read.

1.3.3 The candidate dashboard

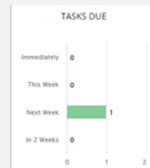




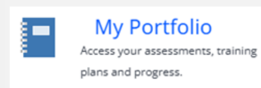




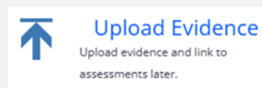
Overall and Target Progress: The dial here shows your progress towards evidencing the standards of proficiency.



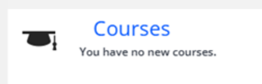
Tasks Due: Here you can see an overview of tasks due now (immediately), this week, next week or in two weeks' time. Tasks in green are not yet due, amber are close to a due date and red are overdue.



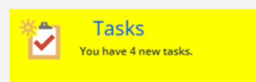
My Portfolio: This provides access to your assessments, evidence, plans and progress. Click here to access your full portfolio (also available from the Portfolio tab in the left side menu bar.



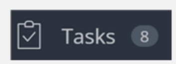
Upload Evidence: Here you can create folders and files of evidence waiting to link to assessments later.

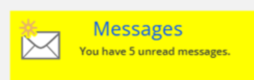


Courses: If you are assigned any interactive learning resources by your training team these will appear here.



Tasks: You will receive tasks here for you to complete. You will see this area highlighted if you have new tasks. Tasks are also accessible from the left side menu and from the top right menu

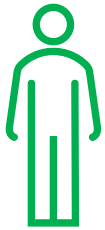


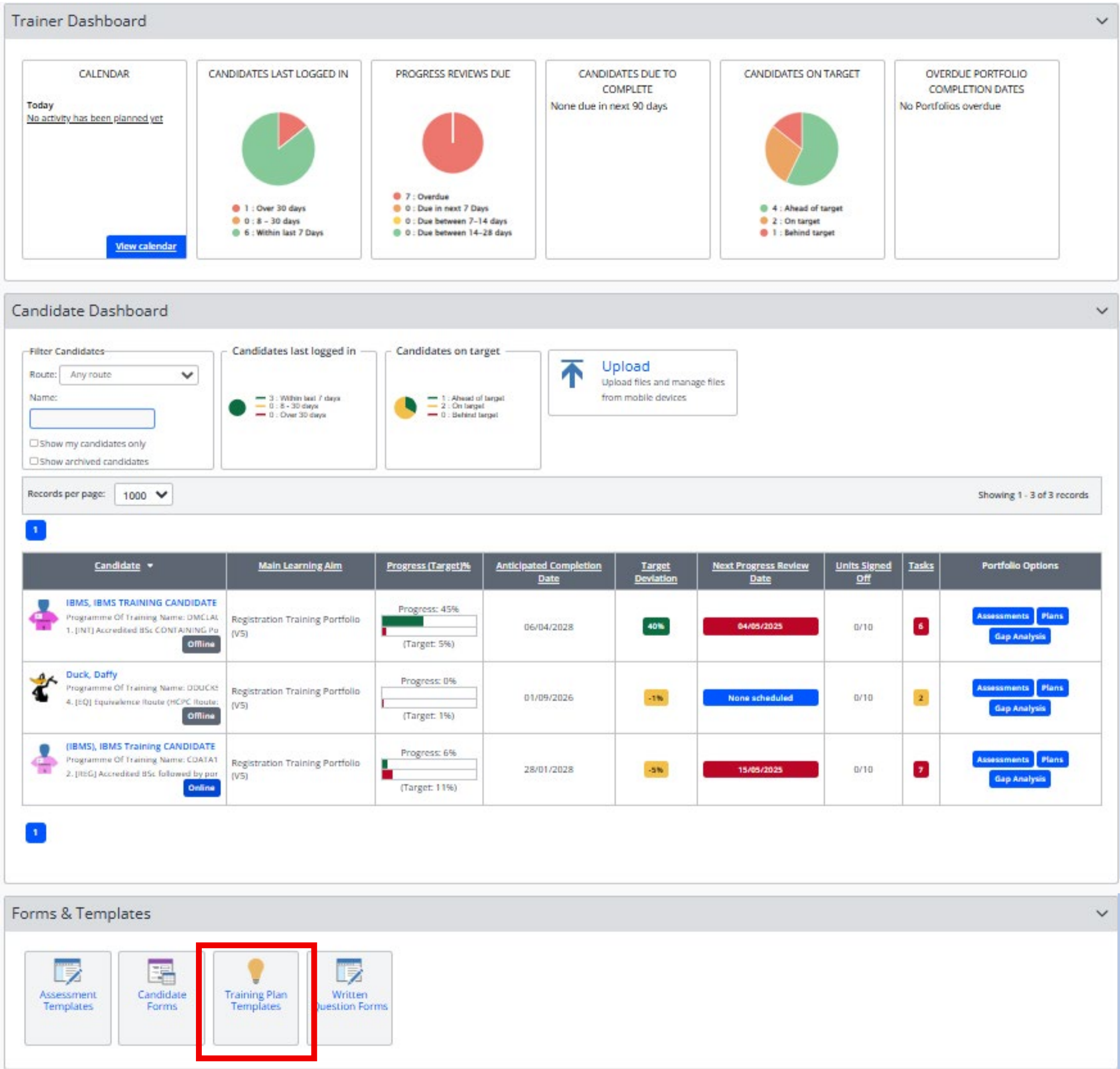


Messages: OneFile has an in-built messaging system that allows you to exchange messages with your trainers. Your training team decides which methods of communication they would like to use.

Resources: IBMS training resources including guides, support tips and links to videos are found here.

1.3.4 The trainer dashboard





Calendar access, candidate activity, progress tracking and performance insights to monitor engagement, upcoming reviews and completion status.

Overview of candidates you are associated with as either a default or additional trainer

Select **Show my candidates only** to see candidates where you are the default trainer

View **Progress** and number of **Units signed off**

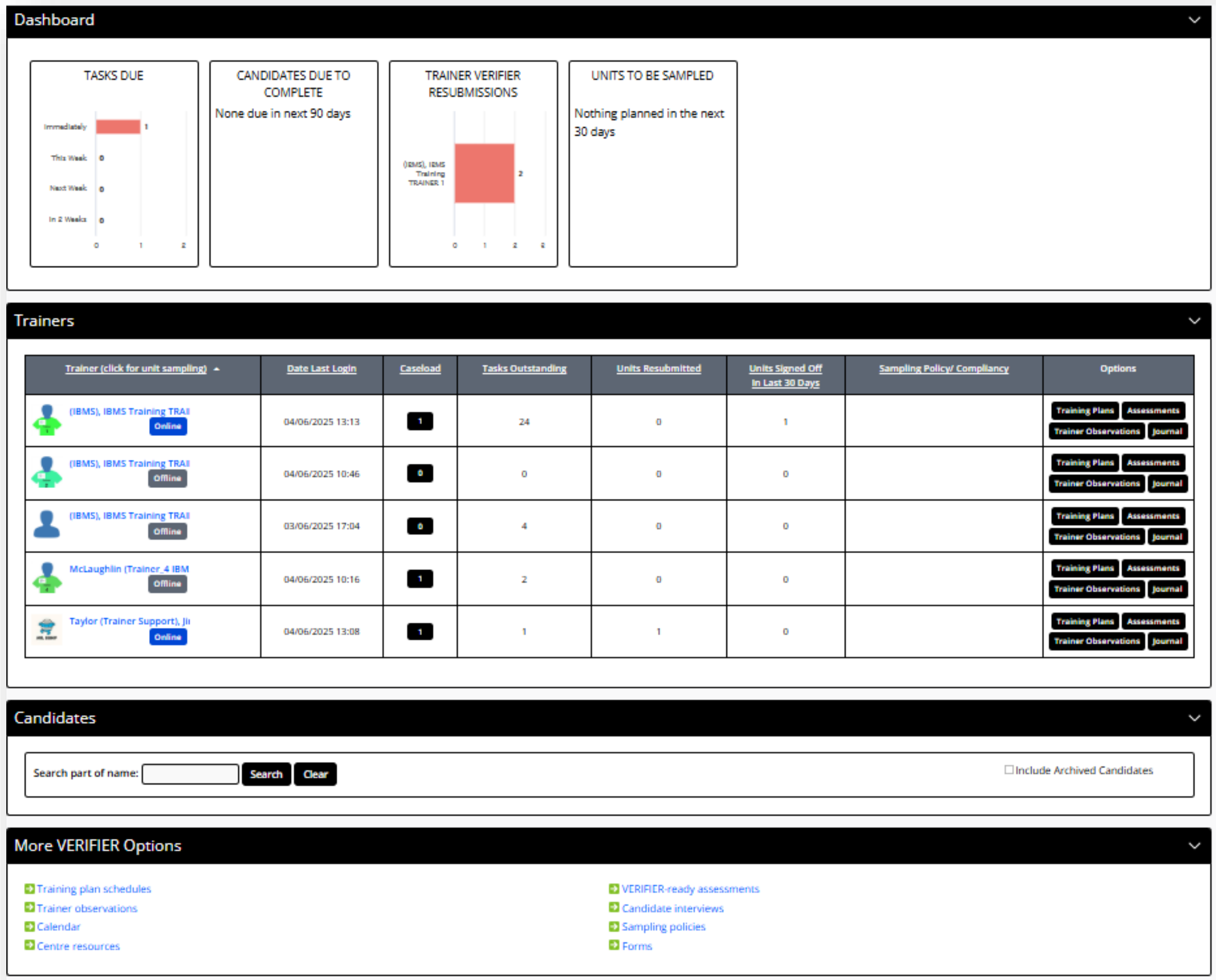
Use the quick links in the last column **Portfolio options** to quickly go the **Assessments** list and G**ap analysis**

Click on the candidate's name to go to their full portfolio

Assign **training plan templates** to your candidates from here

1.3.5 The verifier dashboard

Access to verifier functionality is via the **unit sampling table**, the verifier dashboard is shown here for illustration only.

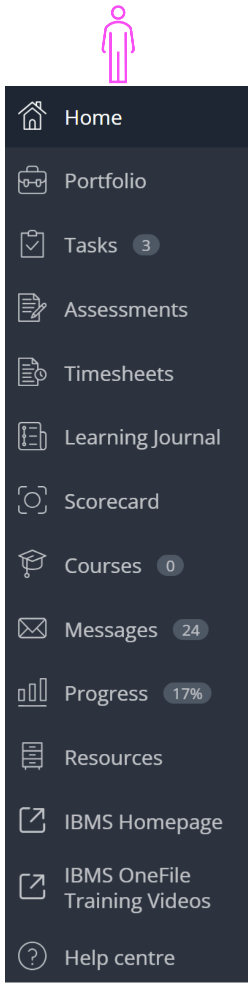


1.3.6 The left side menu

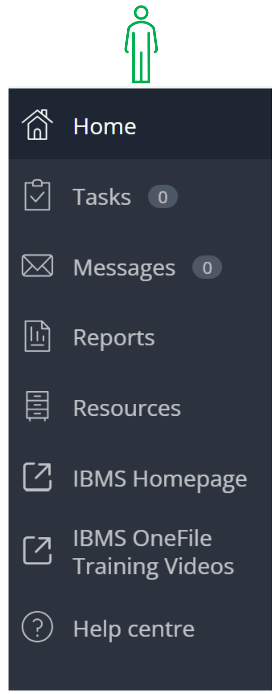
This is the main navigation tool. It appears vertically on the left side of every screen and provides quick access to all key features relevant to your role. Each icon represents a section of the system, such as tasks, messages, your portfolio, or resources.

The side menu always remains visible, but you can choose to collapse it to show icons only.

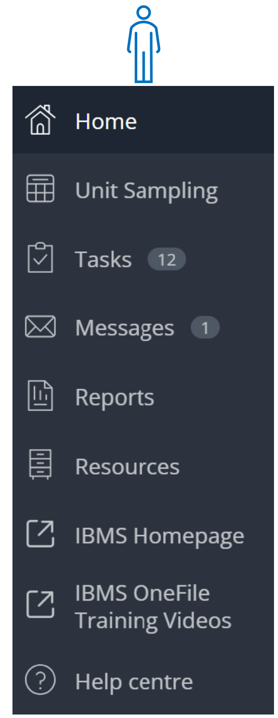
Candidate



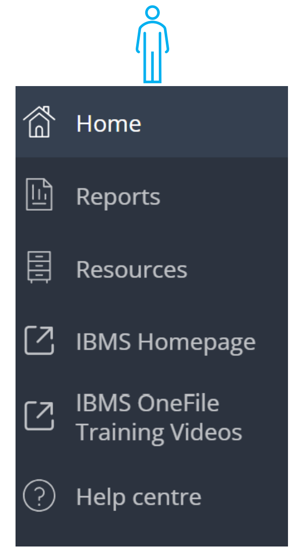
Trainer



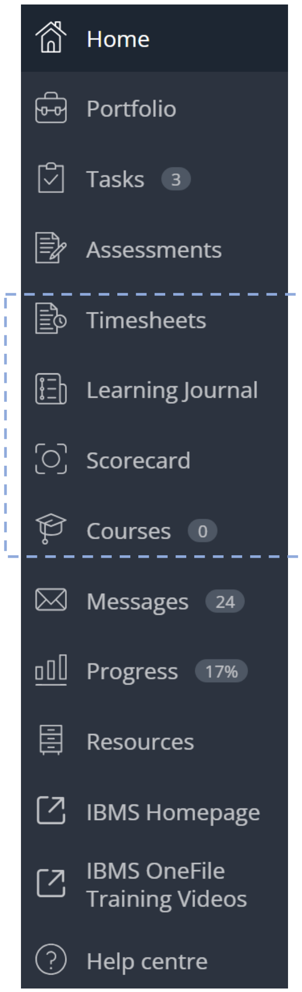
Verifier



Observer



1.3.6.1 *The left side menu – candidates*



Home – this will take you to your portfolio dashboard and is the landing page after signing in.

Portfolio – takes you to a detailed view of your portfolio

Tasks – where you manage all actions assigned to you. This includes assessments to complete, profile updates, review forms, and other portfolio-related activities.

Assessments – lists your assessments. The default status shown is pending (not yet signed off by your trainer) but you can change the drop down to see any status

These features are not currently in use

Messages – OneFile has an in-built messaging system. Your training team decides which methods of communication they would like to use.

Progress – takes you to an overview of portfolio progress shown at unit level

IBMS specific resources:

- **Resources** – links to **guides**, **short support tips**, **webinars** and **module description document**
- **Training videos** – links to the YouTube playlist of IBMS support videos which give step-by-step guidance on how to complete tasks

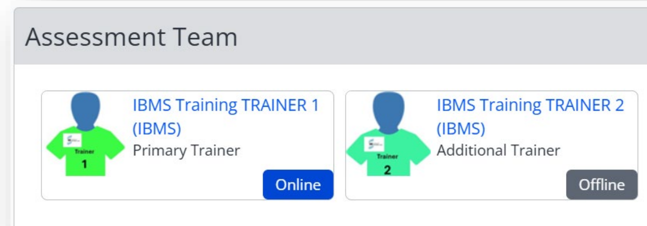
Help Centre – this will give you access to the OneFile's generic help pages.

1.4 Viewing the training team

1.4.1 Candidates

Candidates can view all the people associated with their portfolio directly from the dashboard on the Home page.

Navigate to the **Assessment Team** section of the dashboard.

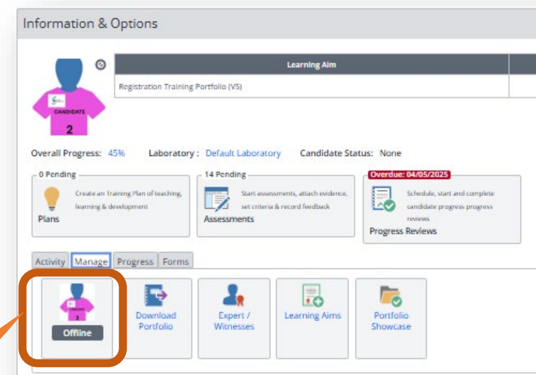


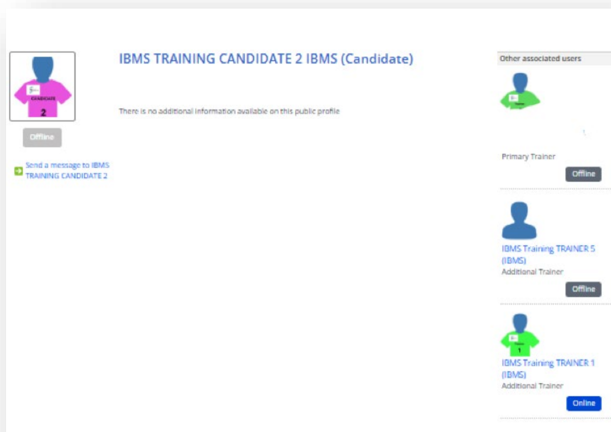
1.4.2 Trainers, verifiers and observers

Any trainer, observer or verifier can view a candidate's training team from the portfolio.

1. Click on the candidate's name to access their portfolio
2. Click the **Manage** tab
3. Click the candidate's **profile picture**

All associated users are shown on the right-hand side





1.5 The task list

OneFile manages the workflow associated with the completion of the portfolio.

Tasks are continually being created and routed in OneFile, and your task list will be constantly updated to reflect actions that you need to take. Some examples of how tasks can be created are shown opposite.

When …	a task is sent …
a candidate is sent a training plan by a trainer	to the candidate asking to accept the plan
a candidate accepts a training plan	to the candidate asking to complete each assessment the plan contained
a candidate signs an assessment and submits it for marking to a trainer	to the trainer asking them to review the submission
a trainer signs a unit summary as complete	to the candidate asking for a sign off
a trainer completes a progress review meeting	to the candidate asking for a sign off
a verifier signs the verifier report form	to the default trainer asking for sign off

1.5.1 Filtering tasks

Use the dropdowns at the top of the task list to **filter** your tasks.

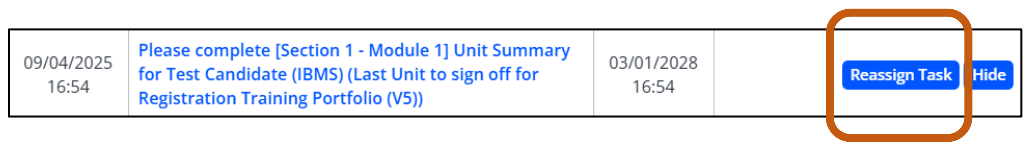
Completed tasks are always available to view by changing the status to completed.

Tasks cannot be deleted; however, they may be hidden. You should only hide a task when there is a legitimate reason to do so.

1.5.2 Reassigning tasks

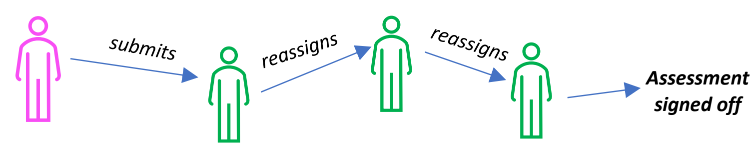
Trainers and **verifiers** have the option to reassign a task to a different user. For example, a trainer may no longer be able to review an assessment submitted for marking and wishes to reassign it to another member of the training team.

1 Click on **Reassign** task beside the task in the task list.
All the users associated with the portfolio that the task relates to are displayed.



2 Select the recipient and add a note (optional).

3 Click **Reassign task**.
The task is removed from the original user's task list and is sent to the specified recipient.



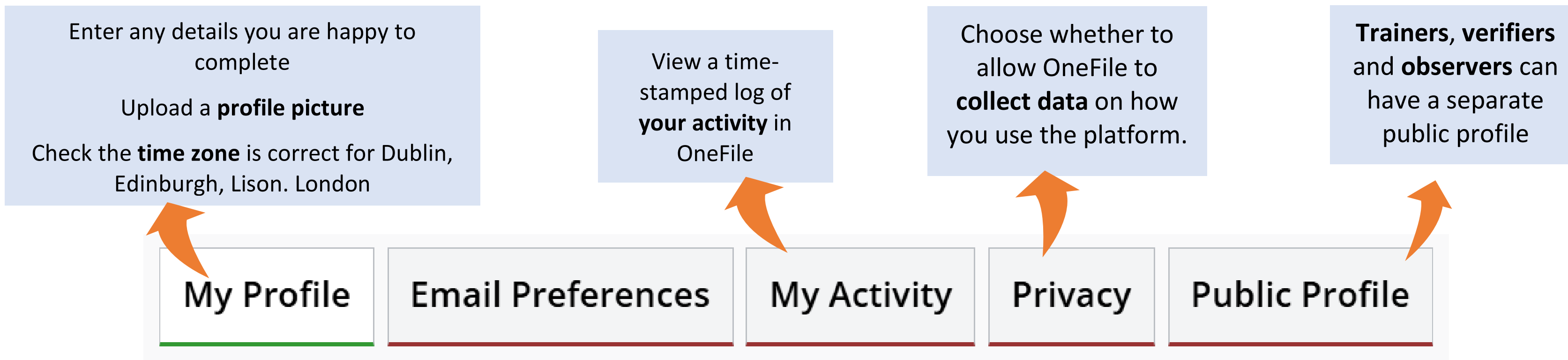
A task can be reassigned multiple times to multiple recipients until it is finally completed.

1.6 First task – Update your profile information

When you first log in you will see a task in your task list that asks you to update your profile information.

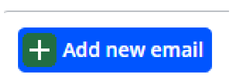
Click on the task text to complete the task.

Date Set	Task (click to open)
15/05/2025 11:39	Please update your profile information



1.6.1 Adding a new email address

It is important that your email preferences are correct. Your primary email address will be set as the email address you registered with. Ensure that you have chosen a primary email that you have access to as password reset emails are sent to this.



If you wish to **add an email address** to this account, for example a personal email address, then click to **Add New** address.

A verification email will be sent automatically to any new email address you add which contains a time-limited link.

1.6.2 Email alerts

Set the system to send you emails on each of your **working days** and always include the **Tasks to do** and **Unread messages**.

A daily digest is recommended rather than ad hoc alerts.

2 Assigning and accepting training

▶ **REFER TO TRAINING VIDEO 2**

Before a candidate can begin working on their portfolio in OneFile, a trainer must first assign a training plan.

The training plan contains assessments. Each assessment is mapped to a set of HCPC standards of proficiency (SOPs). Assigning the correct plan is essential to enable the candidate to start uploading evidence to assessments and progressing through evidencing SoPs.

This section provides guidance on:

- Finding and selecting the appropriate training plan template
- Assigning the plan to candidates

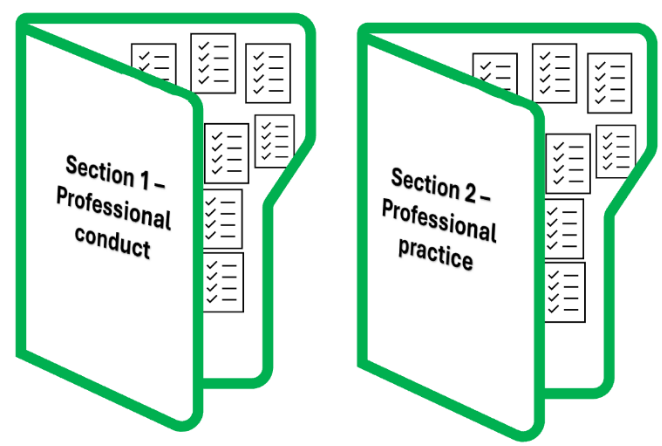
Section 1	Section 2
Module 1: Personal Responsibility and Development	Module 1: Professional Knowledge
Module 2: Equality, Diversity and Inclusion	Module 2: Health and Safety and Wellbeing
Module 3: Communication	Module 3: Quality
Module 4: Patient Records and Data Handling	Module 4: Performing Standard Investigations
Module 5: Professional Relationships	Module 5: Research and Development

2.1 How are training plans structured?

The digital portfolio follows the same structure as earlier paper-based versions of the IBMS Registration Training Portfolio. Default training plans are divided into **two sections**, each containing **five** modules aligned to the HCPC Standards of Proficiency.

Each **module** contains **three assignments**:

- One for mandatory evidence
- Two for candidate choice evidence



To complete the full portfolio, candidates that are not on the equivalence route are expected to complete 30 separate assignments — three per module — to generate the 30 required pieces of evidence.

2.2 Understanding assessments

In OneFile, an assessment (or assignment) is the framework a candidate uses to submit evidence. Each assessment links to a module and allows trainers to monitor progress and track which HCPC SoPs have been demonstrated.

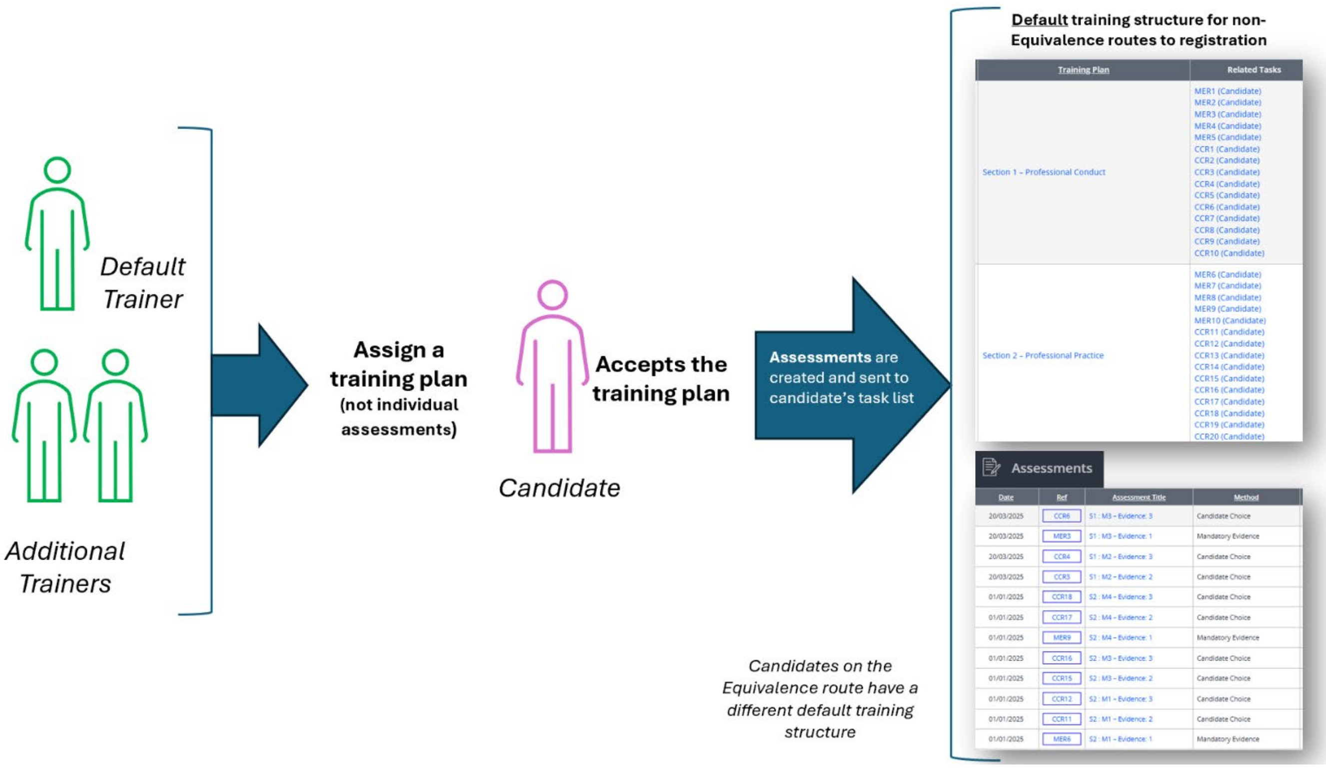
The term “assignment” in this context refers only to the digital structure in OneFile. It does not dictate how the evidence is gathered or what form it takes. Trainers should set learning tasks appropriate to their laboratory and candidate needs.

2.2.1 Mandatory and Candidate Choice Assessments

> ⚠ **The prefix APL is used for assessments for candidates on the equivalence route only. No non-equivalence candidates should have APL assessments in their portfolio.**

Assignment One in each module is pre-defined and used to collect the **mandatory evidence** required for that module. OneFile uses the prefix **MER** for these.

Assignments Two and Three are listed as **candidate choice**. These can be tailored by the trainer and candidate to meet the remaining SoPs associated with that module. OneFile uses the prefix **CCR** for these.



Training Plan	Related Tasks
Section 1 – Professional Conduct	MER1 (Candidate) MER2 (Candidate) MER3 (Candidate) MER4 (Candidate) MER5 (Candidate) CCR1 (Candidate) CCR2 (Candidate) CCR3 (Candidate) CCR4 (Candidate) CCR5 (Candidate) CCR6 (Candidate) CCR7 (Candidate) CCR8 (Candidate) CCR9 (Candidate) CCR10 (Candidate)
Section 2 – Professional Practice	MER6 (Candidate) MER7 (Candidate) MER8 (Candidate) MER9 (Candidate) MER10 (Candidate) CCR11 (Candidate) CCR12 (Candidate) CCR13 (Candidate) CCR14 (Candidate) CCR15 (Candidate) CCR16 (Candidate) CCR17 (Candidate) CCR18 (Candidate) CCR19 (Candidate) CCR20 (Candidate)

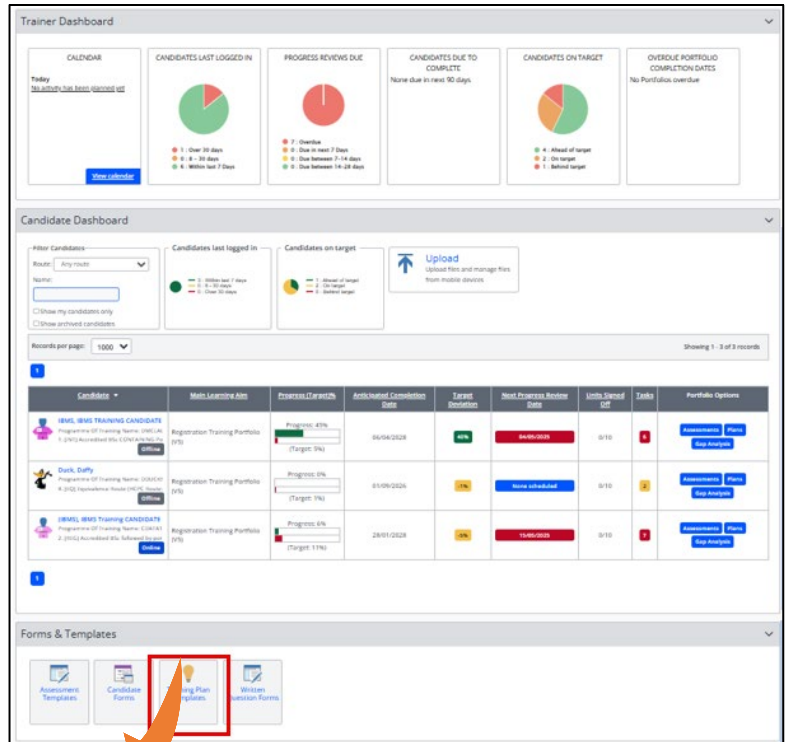
Date	Ref	Assessment Title	Method
20/03/2025	CCR6	S1 : M3 – Evidence: 3	Candidate Choice
20/03/2025	MER3	S1 : M3 – Evidence: 1	Mandatory Evidence
20/03/2025	CCR4	S1 : M2 – Evidence: 3	Candidate Choice
20/03/2025	CCR3	S1 : M2 – Evidence: 2	Candidate Choice
01/01/2025	CCR18	S2 : M4 – Evidence: 3	Candidate Choice
01/01/2025	CCR17	S2 : M4 – Evidence: 2	Candidate Choice
01/01/2025	MER9	S2 : M4 – Evidence: 1	Mandatory Evidence
01/01/2025	CCR16	S2 : M3 – Evidence: 3	Candidate Choice
01/01/2025	CCR15	S2 : M3 – Evidence: 2	Candidate Choice
01/01/2025	CCR12	S2 : M1 – Evidence: 3	Candidate Choice
01/01/2025	CCR11	S2 : M1 – Evidence: 2	Candidate Choice
01/01/2025	MER6	S2 : M1 – Evidence: 1	Mandatory Evidence

Examples of acceptable evidence types for candidate choice assessments are given in the guidance documentation.

These suggestions are for guidance only — trainers are encouraged to support a variety of evidence types and assessment methods to suit the candidate's learning style and workplace environment.

2.3 Assigning default training plans

Trainers assign training to candidates. There is a precise sequence of steps that must be followed to accurately assign training plans. Please follow the instructions given here and shown in Training Video 2.



Key principles:

- Training plan templates, not individual assessment templates, are used to deliver training to candidates
- Training plan templates contain a set of 15 assessments for each section of the portfolio
- When the candidate accepts the training plan, OneFile creates assessments in the candidate's portfolio
- Assessments are numbered consecutively at the time of their creation

2.3.1 Selecting the training template & candidate(s)

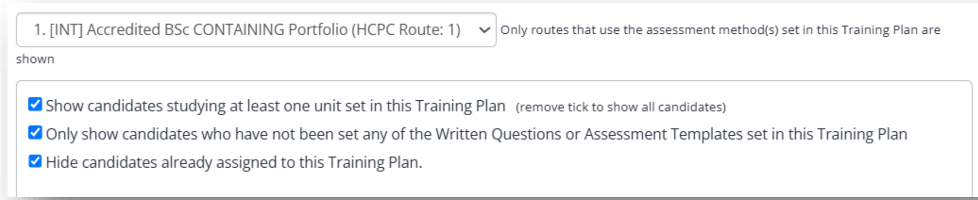
1. Select **Training Plan Templates** from the *Forms & Templates* section in the trainer dashboard.
2. The centre templates available to you to assign are shown. Each contains 15 assessments, mapped to the relevant SoPs. You may view the template to see the content before you assign it.
3. Select which section you wish to assign.
4. Click **Assign to Candidate(s)**

Centre Templates

1

Training Plan Template Name (Centre Ref)	Training Plan Name (Candidate Ref)	Options
[REG] [INT] [NADA] Section 1 – Professional Conduct	Section 1 – Professional Conduct	View Template / Assign to Candidate(s)
[REG] [INT] [NADA] Section 2 – Professional Practice	Section 2 – Professional Practice	View Template / Assign to Candidate(s)

5. Choose the route.



<u>Do not change any of the three check boxes that are preselected below the route dropdown.</u>

6. A list of candidates to choose from is displayed.

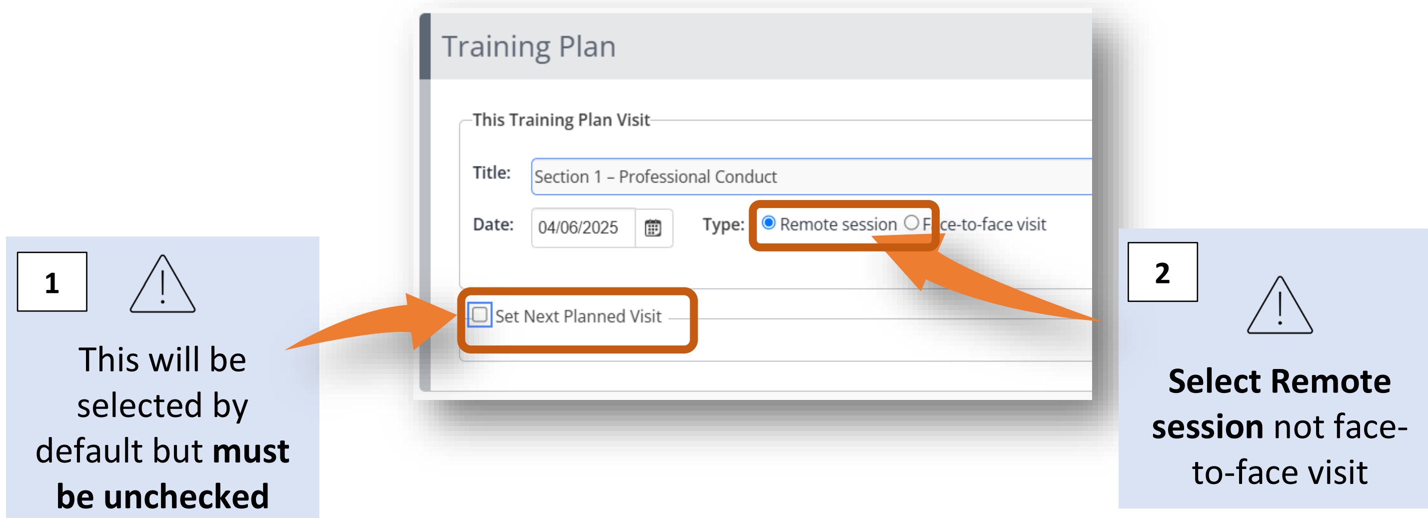
   Click the checkbox to the left of the candidate(s) name to select the candidate. To select all candidates, click once on **Select All** above the list of candidates.

   Note: Selecting more than one candidate allows you to issue the same training plan to all candidates selected. This should only be done if you want to use the **same start and due dates** for the assessments within the training plan for every candidate you choose. If you wish to use different start/end dates for each candidate, then they will need to be assigned training plans individually.

The training plan that will be assigned to the candidates selected is displayed.

2.3.2 Reviewing the training plan

Two changes **must** be made in the training plan section:



2.3.3 Amending assessment start and end dates

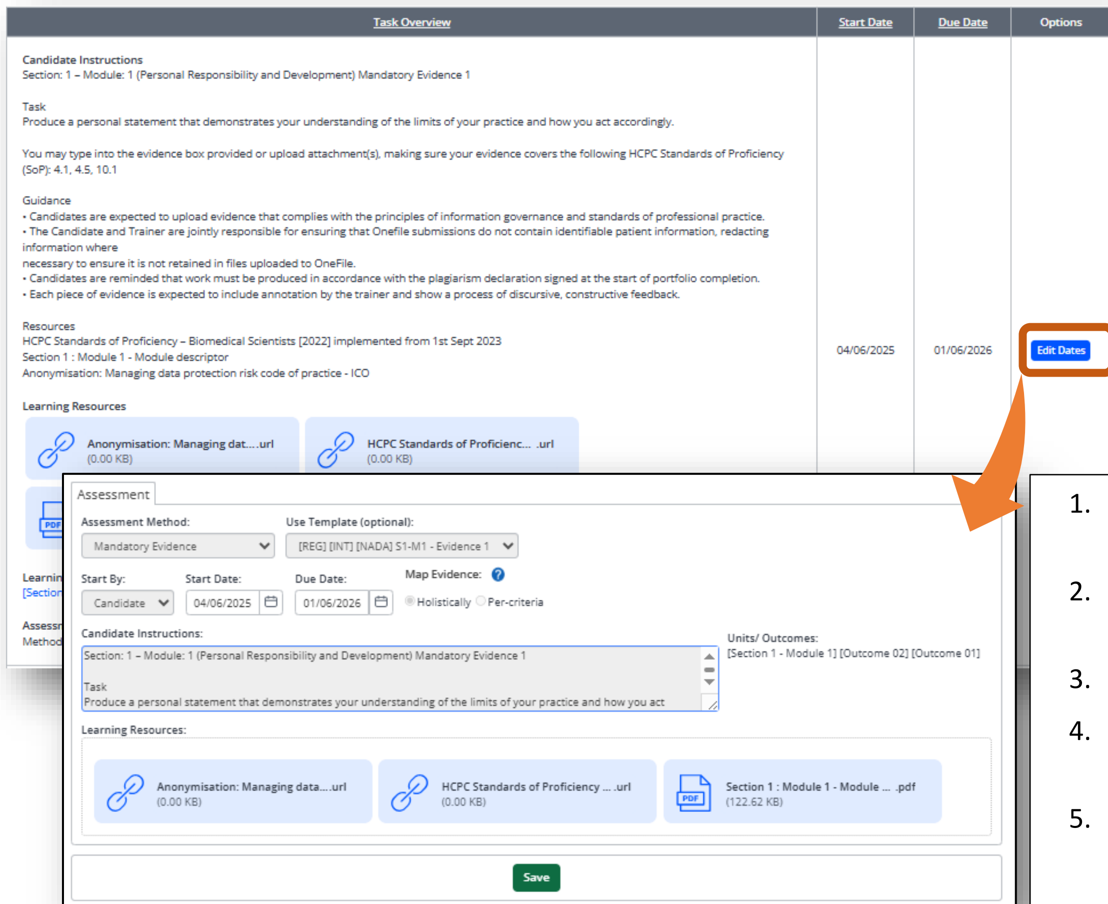
Each assessment in the plan is shown. You can amend the start and end dates if you do not wish to use the defaults.

Start date: The date that the assessment will be planned to start from. By default, this will set to the current date.

End date: The date in which the candidate has been set as the deadline date for the assessment. Defaults to a year ahead after start date

The **instructions for each assessment** that the candidate will see.

This includes the assessment title, SoP mapping, guidance and resources



1. Click **Edit Dates** to open the pop-up
2. Enter the **Start Date** and **Due Date** in **DD/MM/YYYY** format.
3. Click **Save**
4. Confirm the updated dates appear on the training plan
5. Double-check for accuracy. If incorrect, repeat the steps to edit

Points to consider when amending assessment dates:

When you assign the training plan to a candidate, they must formally accept it through OneFile. At the point they accept the plan, each assessment within that plan is created and a separate task for each sent to the candidate's task list. Using staggered start/end dates will overcome the potential for being overwhelmed by a large number of assessments

Conversely, if you delay the release of an entire section of the portfolio, or choose start dates too far in the future, candidate progression through the portfolio might be delayed if they get ahead of their targets.

2.3.4 Signing the plan

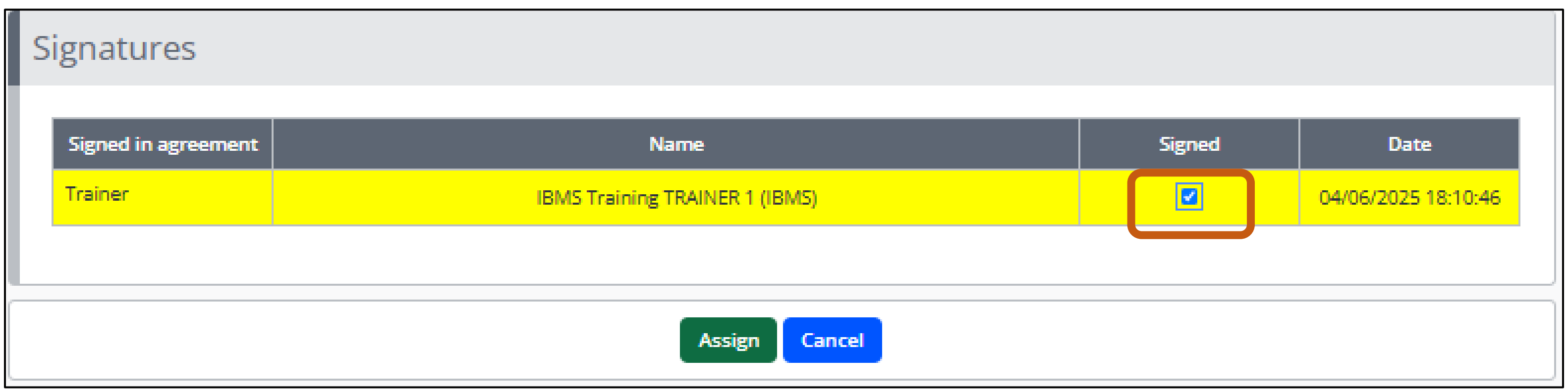
The plan must be signed by the trainer. A signature in OneFile is captured by ticking in any Signed checkbox. The date and time of signing is captured.

1. Scroll past the Attachments, Feedback & Comments and Issues Arising sections. These should be left blank and ignored.

2. Tick the Signed box.

> **Ticking the Signed box is a feature throughout OneFile used by candidates, trainers and verifiers. The digital 'tick in the box' replaces the need for a 'wet' signature on a physical document.**

3. Click **Assign**. The candidate(s) selected will be sent a task (see Section 2.5).



2.4 Assigning custom training

▶ REFER TO TRAINING VIDEO 8

Custom training plans can be developed by a trainer. Video guidance is available that describes how to create a custom training plan template.

Note that:

- You should become familiar with the **default** training plans and OneFile use first before developing custom training
- Mandatory tasks (MERs) must be completed using the IBMS tasks as written (SOPs can be added but not removed)
- Customisation revolves around **candidate choice content** and **mapping**, and the timing and structure of assessment release
- All SoPs must be covered across the portfolio – this can be checked using portfolio tools such as the Gap Analysis

2.5 Accepting a training plan

The overview shown in Section 2.2.1 illustrates that a training plan must first be: (1) assigned by a trainer to a candidate, and (2) accepted by the candidate before any assessments are created in the candidate's portfolio.

When you receive a task to sign a training plan that has recently been sent to you by your trainer, you must check the tasks and accept the plan to confirm you have understood what is required.

Date Set	Task (click to open)
14/05/2025 15:24	Please sign your recently prepared Training Plan by IBMS Training TRAINER 1 (IBMS)

1. Click into the Task title to open the Training Plan for signing:

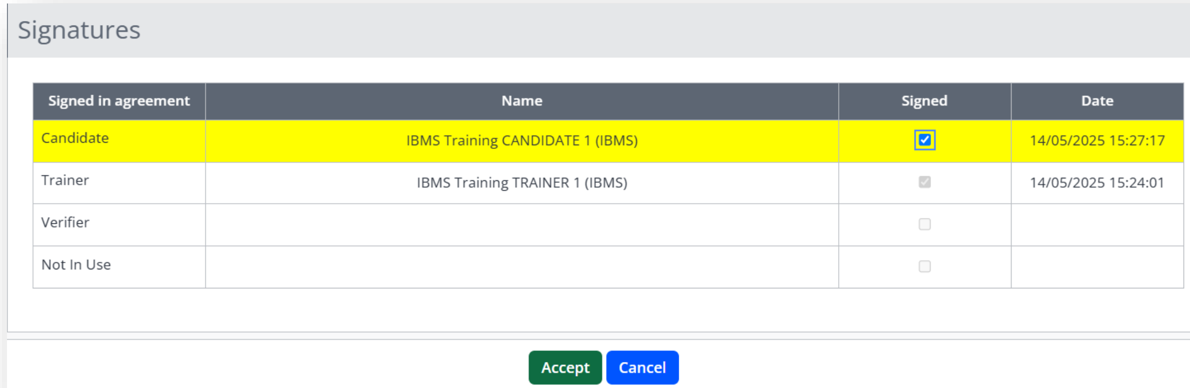
Please sign your recently prepared Training Plan by IBMS Training TRAINER 1 (IBMS)

Read this training plan carefully' before choosing to **Accept** or **Reject** it. If you Accept it you must also sign the box in the highlighted band below.
After signing, Tasks for you to start today or in the past will appear in your task list.

2. Read through the Training Plan requirements.

The due dates will appear on the right-hand side of each task. This will be the maximum time you have to complete this work.

3. Once you are ready to accept the plan, sign the declaration at the bottom of the page by checking the signed box and click the green **Accept** button.

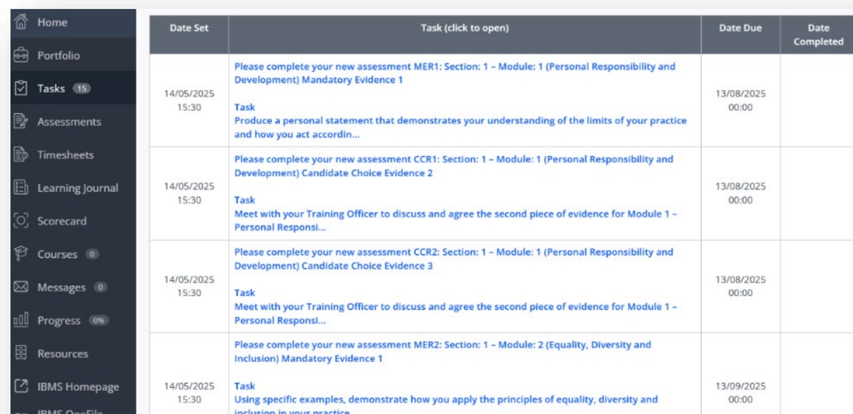


⚠	**Ticking the Signed box is a feature throughout OneFile used by candidates, trainers and verifiers.** **The digital 'tick in the box' replaces the need for a 'wet' signature on a physical document.**

What happens when a training plan is accepted?

Once the training plan is accepted by the candidate, OneFile:

- Creates the assessments that the plan contained in the candidate's portfolio
- Sends a series of tasks (one for each assessment) to the candidate's task list



2.6 Viewing assessments

The Assessment list shows all the assessments in the portfolio and can be accessed in multiple ways to all users associated with the portfolio.

The list defaults to show ‘Pending’ tasks, but you can change the dropdown to show ‘Completed’, ‘Pending’, ‘Pending requiring your action’ and ‘Future Planned’ assessments.

The list also indicates **where each assessment is located**. In the example shown, all assessments except **CCR4** are currently being worked on by the candidate. CCR4 is awaiting action by the trainer.

Candidates can view assessments by clicking…	**Trainers** can view assessments by clicking …
• on a task related to the assessment in their task list • the Assessment tab in the left side menu • the Assessment tile in the dashboard • on Portfolio in the left side menu and clicking on the Assessment tile	• on a task related to the assessment in their task list • on Assessment on the right side of the list of candidate names in the dashboard • the candidate’s name in the dashboard to open the portfolio and then clicking on the Assessment tile

Show: Pending

Date	Ref	Assessment Title	Method	Trainer Assessment Time (minutes)	Candidate Assessment Time (minutes)	Related Training Plan	Action Required By	Options
12/05/2025	CCR10	S1 : M5 – Evidence: 3	Candidate Choice	0	0	Section 1 – Professional Conduct	Candidate	Edit
12/05/2025	CCR9	S1 : M5 – Evidence: 2	Candidate Choice	0	0	Section 1 – Professional Conduct	Candidate	Edit
12/05/2025	MER5	S1 : M5 – Evidence: 1	Mandatory Evidence	0	0	Section 1 – Professional Conduct	Candidate	Edit
12/05/2025	CCR8	S1 : M4 – Evidence: 3	Candidate Choice	0	0	Section 1 – Professional Conduct	Candidate	Edit
12/05/2025	CCR7	S1 : M4 – Evidence: 2	Candidate Choice	0	0	Section 1 – Professional Conduct	Candidate	Edit
12/05/2025	MER4	S1 : M4 – Evidence: 1	Mandatory Evidence	0	0	Section 1 – Professional Conduct	Candidate	Edit
09/05/2025	CCR4	S1 : M2 – Evidence: 3	Candidate Choice	0	0	Section 1 – Professional Conduct	Trainer	Edit
09/05/2025	CCR3	S1 : M2 – Evidence: 2	Candidate Choice	0	0	Section 1 – Professional Conduct	Candidate	Edit

An assessment must always be in a user’s task list.

The assessment list shows both the status of the assessment (Future Planned, Pending, Completed) and, if not completed where it is located (with the Candidate or Trainer user role).

Once signed by the trainer, the assessment is Completed:

Action Required By
Action Completed

.

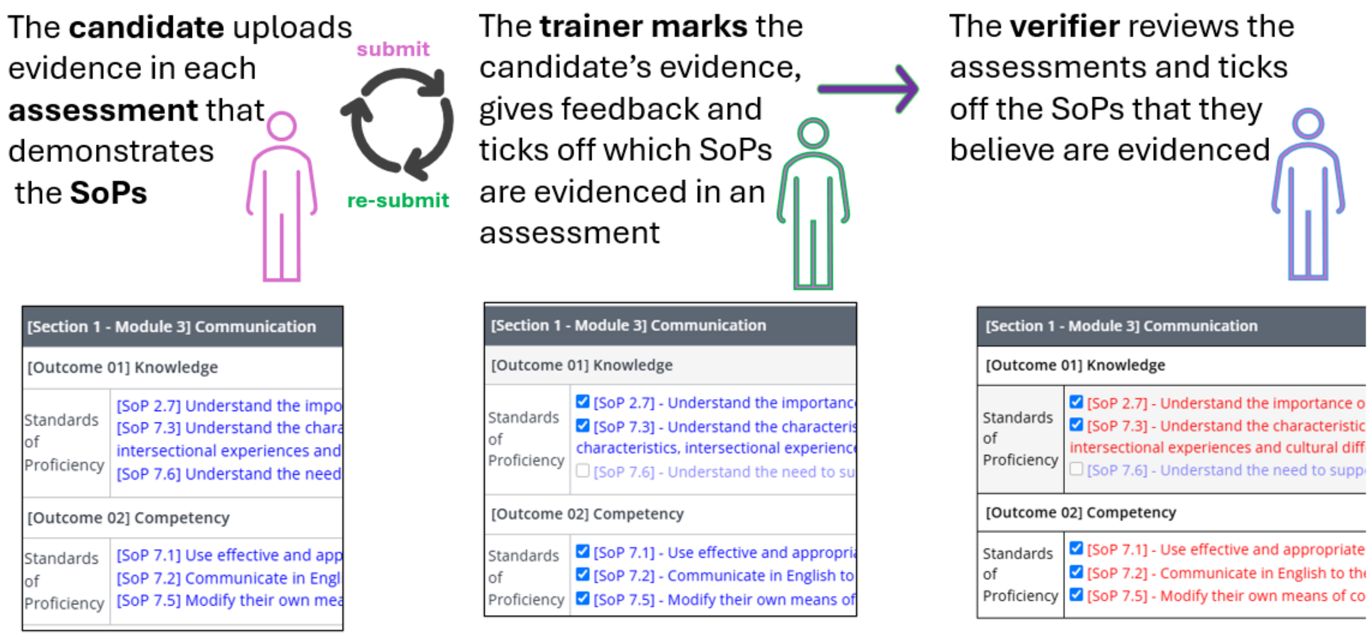
3 Submitting evidence

▶ REFER TO TRAINING VIDEO 3

A candidate can view assessments in multiple ways (see Section 2.6) and should work through the assessments as requested by the Training team.

3.1 Understanding SoPs

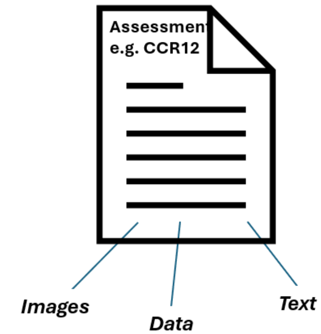
Each assessment is mapped to specific SoPs. The candidate uploads evidence that demonstrates the associated SoPs. Eventually, both trainer and verifier confirm whether or not the SoP has been evidenced. OneFile tracks both SoP mapping and evidence status.



The SoPs in mandatory assessment must be met. SoPs can be added to mandatory assessment but not removed. Trainers can adjust the SoP mapping in candidate choice assessments

3.2 Adding evidence to an assessment

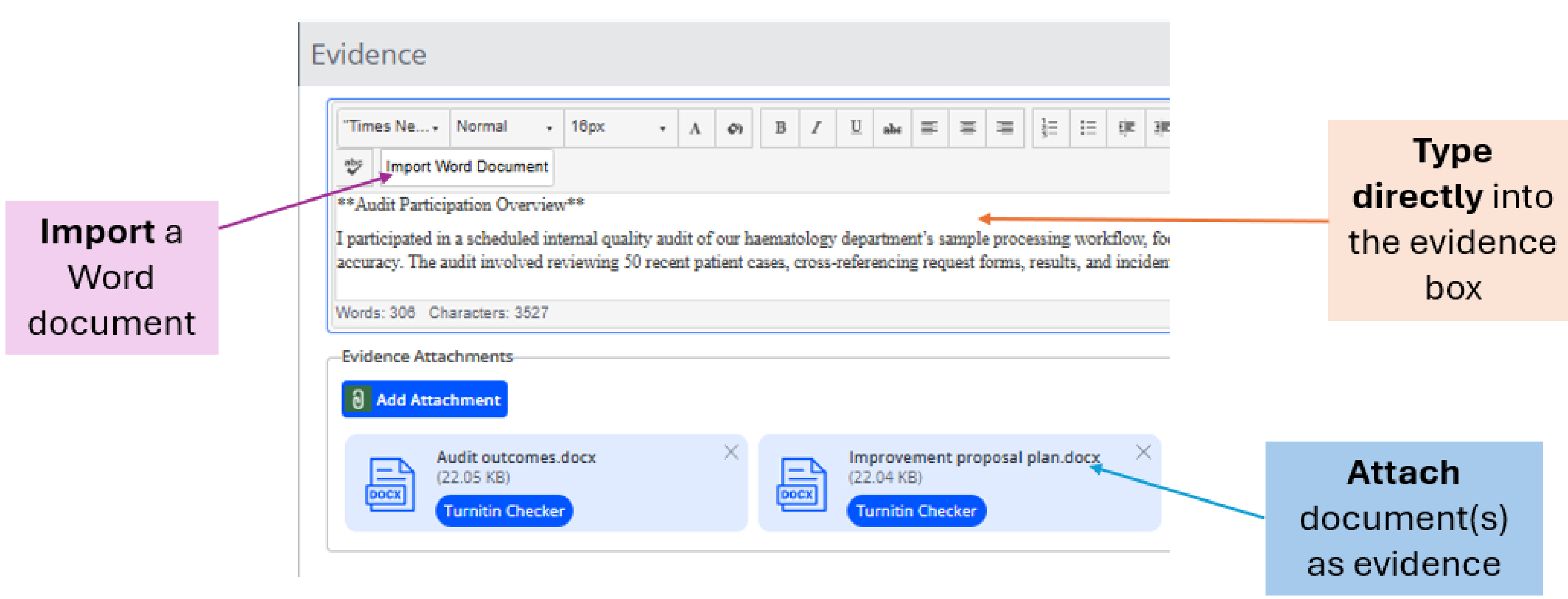
3.2.1 Methods of adding evidence



- Evidence is all the information that has been associated with an assessment by the candidate.
- Evidence can be: (1) imported from a MS Word document, (2) typed directly into the evidence field, or (3) attached as a file(s) from the uploaded evidence area or directly from a computer.

Candidates should liaise with their trainers to agree the preferred method of evidence addition.
How evidence has been added determines how it can be marked.

Methods (1) and (2) support trainer annotations and are therefore recommended. However only Method (3) supports the use of the plagiarism checker, Turnitin. A hybrid model can be used successfully whereby candidates use the import feature on drafts to support annotation, but also upload a final version of the imported Word to provide a plagiarism checking score.



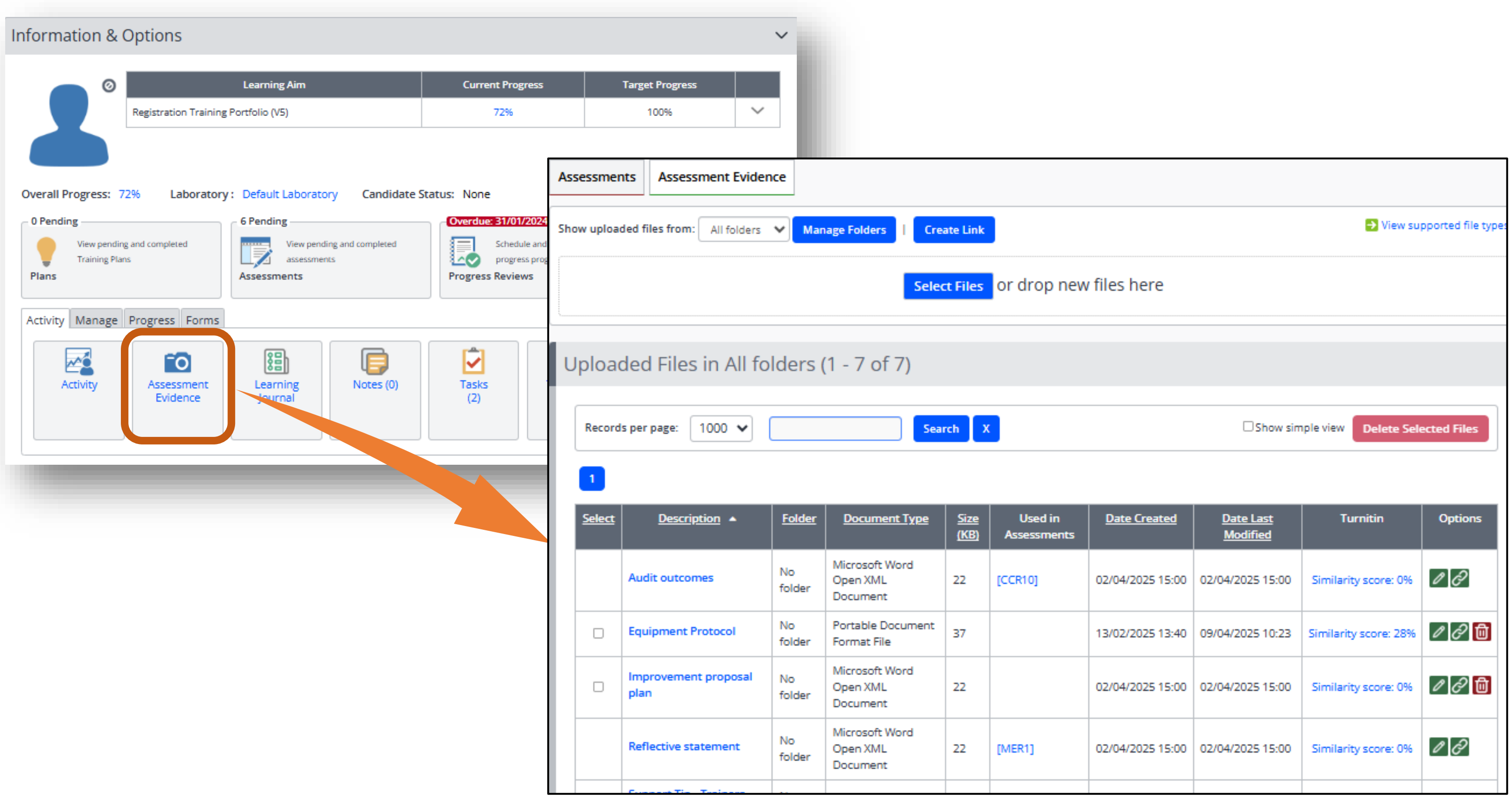
3.2.2 Adding justifications to assessments

A justification must be included in all assessments. A separate document containing justification is not required.

We strongly recommend that candidates state their justification in the Feedback & Comments section in the assessment. It means that the justification is always immediately visible to whoever is reviewing the work. Verifiers have reported that this location makes justifications immediately visible. Training teams can adopt a different approach, but this should be consistent.

3.3 Uploading evidence

Candidates can use the **Assessment Evidence** area of OneFile to upload files that they may subsequently use in an assessment.



3.4 Plagiarism and AI writing detection

Candidate must acknowledge the various resources used during their training and in their evidence. Any evidence of plagiarism will result in failure of the portfolio and the candidate will be required to complete a new Registration Training Portfolio.

3.4.1 Declarations

Every time a candidate or trainer signs an assessment or unit summary in OneFile, they are making a clear declaration that the work is authentic and a true representation of the candidate's own knowledge and competence. Additionally, candidates declare that external sources of information have been appropriately referenced.

3.4.1.1 Individual assessment declarations

Declaration	Name	Signed on Completion	Date
I confirm that the evidence presented for this assessment is authentic and a true presentation of my own work. Any external sources I have used have been appropriately cited/referenced.	IBMS Training CANDIDATE 1 (IBMS) (Candidate)	☐	05/06/2025 08:28
Knowledge and competence has been demonstrated by the Candidate in this assessment. I am satisfied that the evidence meets the mapped SoPs and is a true representation of the Candidate's own work.	IBMS Training TRAINER 1 (IBMS) (Trainer)	☐	05/06/2025 08:32

3.4.1.2 Unit summary declaration

I confirm that the evidence presented for this unit is authentic and a true presentation of my own work. I am satisfied with the way the assessment(s) was conducted and with the outcome(s).

	Name	Signed	Date
Candidate	IBMS Training CANDIDATE 1 (IBMS)	☐	05/06/2025

Knowledge and competence has been demonstrated by the Candidate in all of the elements of this module using the required assessment procedures and any special conditions/contexts. I am satisfied that the evidence meets the threshold requirements for HCPC registration as a Biomedical Scientist.

	Name	Signed	Date
Trainer	IBMS Training TRAINER 1 (IBMS)	☐	05/06/2025

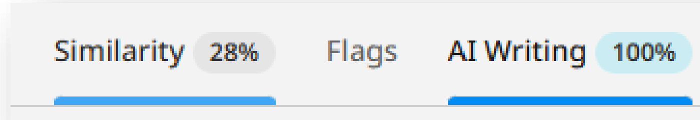
3.4.2 Plagiarism software

OneFile integrates with the plagiarism detection platform Turnitin (https://www.turnitin.co.uk).

This feature can be used when a file is uploaded into the Assessment Evidence area of OneFile. It is not currently available when a MS Word file is imported (see Section 3.2.1).

Turnitin provides both a similarity score and an AI writing score.

The AI writing score is visible to Trainers, Verifiers and Observers.

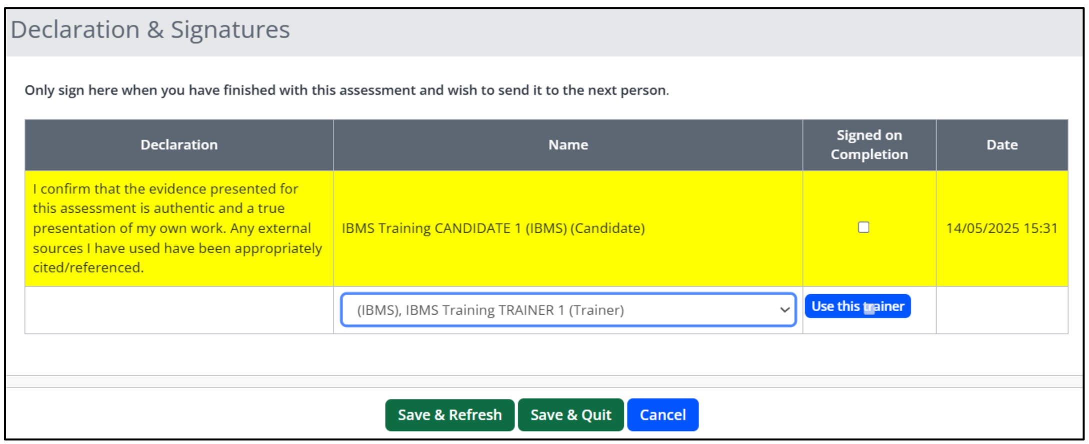


Refer to the **Support Tip – Turnitin FAQ** found under the **Resources** tab in left side menu for more information.

3.5 Saving, signing and submitting assessments

The Declaration & Signatures section is found at the end of the assessment.

What happens to the assessment next is determined by the presence or absence of the candidate's signature.



Option 1 – Save, don't send

To keep adding evidence to an assessment <u>but not submit</u> it for marking:

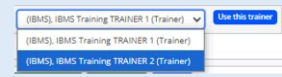
- **<u>Do NOT tick</u>** the Signed on Completion box
- Click **Save & Refresh**

Candidate can continue to edit the assessment

Option 2 – Sign and Send

To submit an assessment to a trainer for review:

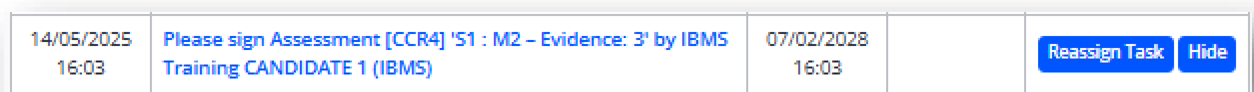
- **<u>Tick the box</u>** next to your name to **sign** the declaration
- **Select the trainer you wish to send the work to**

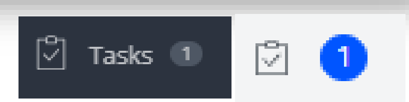


- Click **Save & Quit**

Candidate can no longer edit the assessment.

The selected trainer receives a task





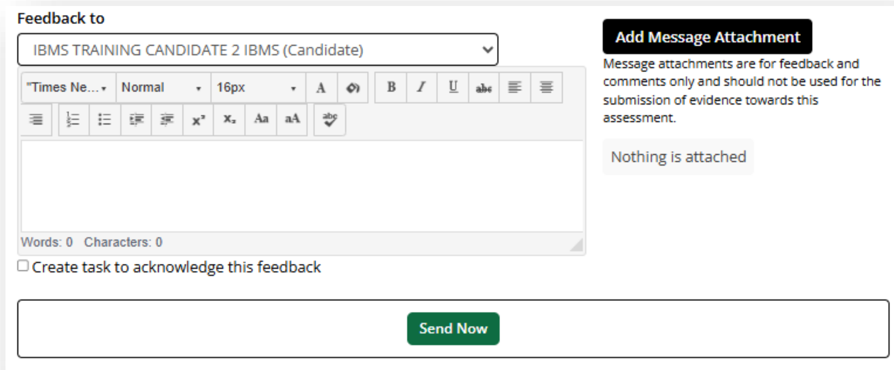
3.6 Feedback & Comments

Each assessment has a Feedback & Comments section.

Section 3.2.2 notes that this should be used by candidates to state their justifications.

Anything written in this section is visible to anyone with access to the portfolio.

When a trainer reviews a submission, feedback must be given to the candidate. A task should be sent, asking the candidate to acknowledge this feedback.



05/06/2025 10:15	Please acknowledge the Assessment feedback provided by IBMS Training TRAINER 5 (IBMS) on CCR12 for IBMS TRAINING CANDIDATE 2 IBMS	29/02/2028 10:15

3.6.1 Acknowledging trainer feedback

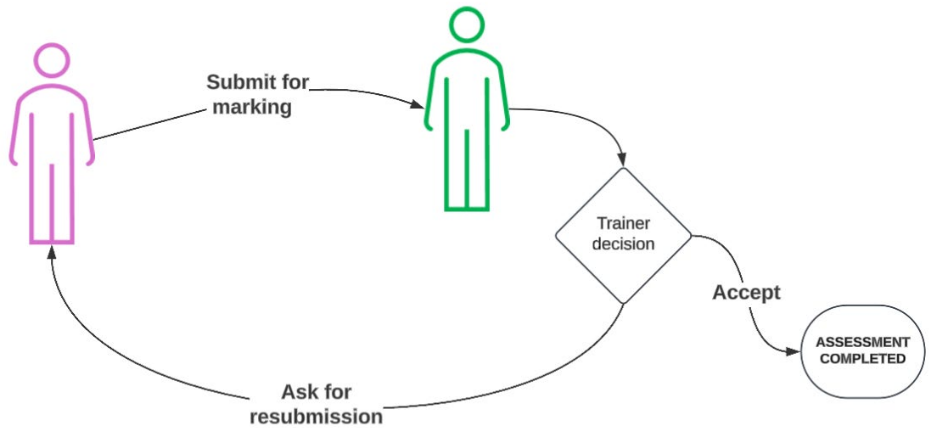
1. Click into the task text to open up the assessment.
2. Scroll down to the Feedback & Comments section where you can read the feedback on your achieved work
3. Click the button to ‘Mark as Read’

This will provide acknowledgement that you have read the feedback

If required you can reply to the feedback. This will not create a task for the trainer; however your feedback will be visible in the assessment.

4 Marking work

▶ **REFER TO TRAINING VIDEO 4**



When a candidate submits an assessment, the Trainer receives a task asking them to 'sign' the assessment (see Section 3.5).

The Trainer assesses the evidence, confirms which criteria (SoPs) have been met and leaves feedback.

Evidence can be resubmitted (returned) back to the Candidate for additional work or accepted (marked as completed).

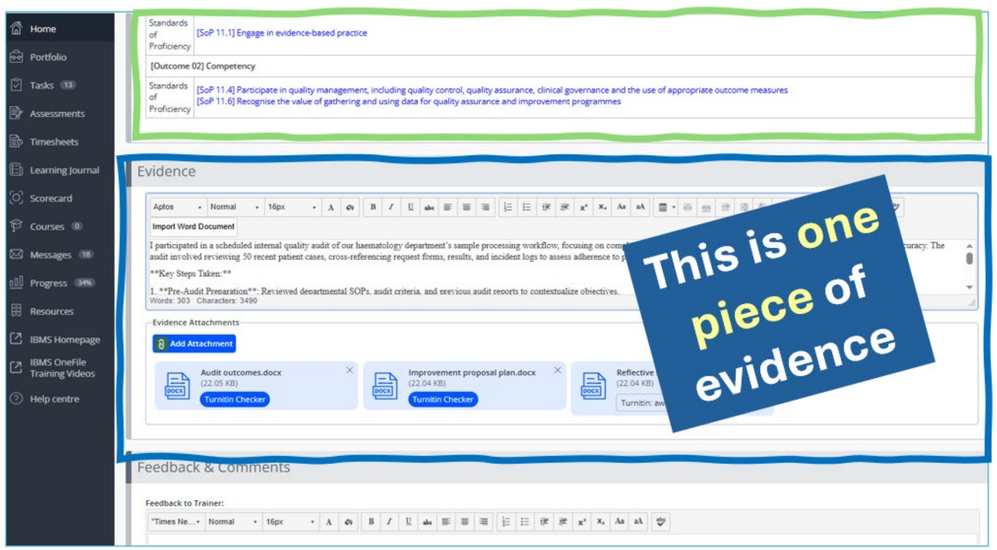
4.1 Types of marking

The method of marking work is determined by how the evidence has been submitted. For example, if the candidate has used the import MS Word feature, then the trainer can **annotate** the evidence directly.

In every case, the trainer reviews the evidence against the required SoPs, unticking those which are not met, and leaving those that are ticked.

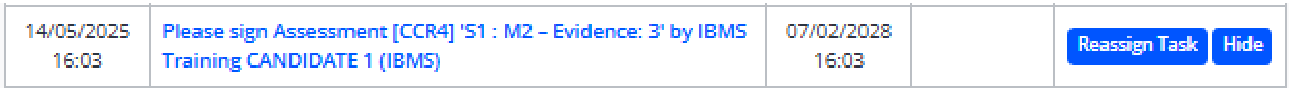
In candidate choice assessments SoP mapping can be adjusted. In mandatory assessments SoPs can be added.

Constructive feedback should always be given to the candidate.

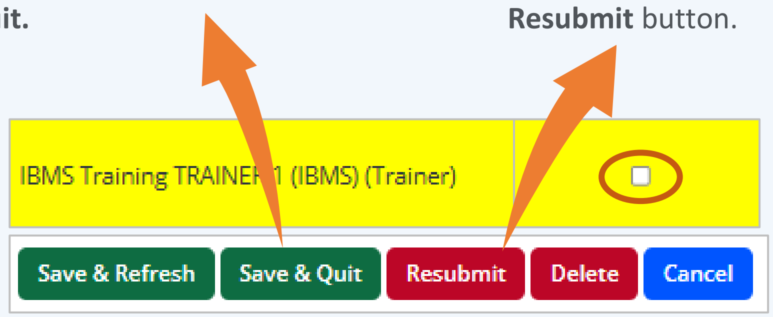


4.2 Marking an assessment

1. Select 'Task' from the left side menu. You will be presented with a list of all the work you have been asked to sign.



2. Click on a task to open the assessment it relates to.
3. Read the Task Overview section to understand the Candidate requirements for the task and therefore what you will be assessing.
4. **Carefully review the SoPs and tick/untick to reflect the work presented.** The criteria for the evidence are pre-assigned. Every pre-mapped SoP in a mandatory assessment (MER) **must be met**. You can only **add** (not remove) SoPs to MERs. For the candidate choice evidence (CCR), you may need to make changes to the assessment criteria, depending on the work presented (see Section 4.3).
5. Scroll to the Evidence section. Review any written or attached evidence from the Candidate.
   This may be attached or imported.
6. Once you have assessed the evidence, leave constructive and specific feedback for the Candidate.
7. If the Candidate has **successfully completed** the task and the feedback will be final for this task i.e., there is no further work required, then tick the 'Create task to acknowledge this feedback' button so the Candidate reviews all feedback given.
8. To **sign off** the evidence as complete tick next to your name and then click **Save & Quit.**
9. If **further work** is required, do not tick this option as the Candidate will receive a task for further work on this task anyway. Ensure you provide clear instructions to the Candidate on what additional work is required.
10. To **resubmit** the evidence back to the Candidate for further work, **do not sign** the assessment and click the **Resubmit** button.



4.3 Adjusting SoP mapping

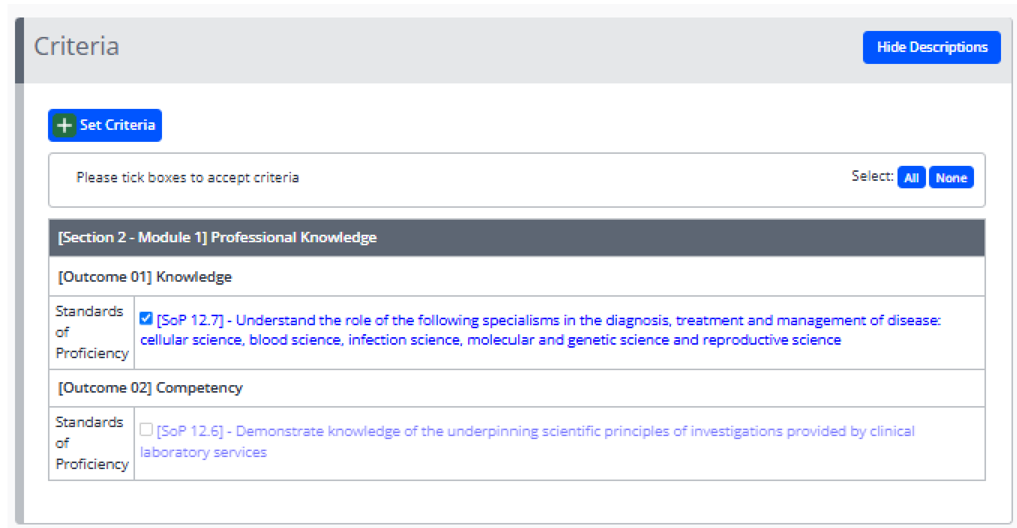
The **Gap Analysis tool** should be used to see which assessments evidence which SoPs across the entire portfolio (see Section 5.2). Candidate choice evidence for each module needs to cover, across the two submissions, the assessment criteria indicated in the task.

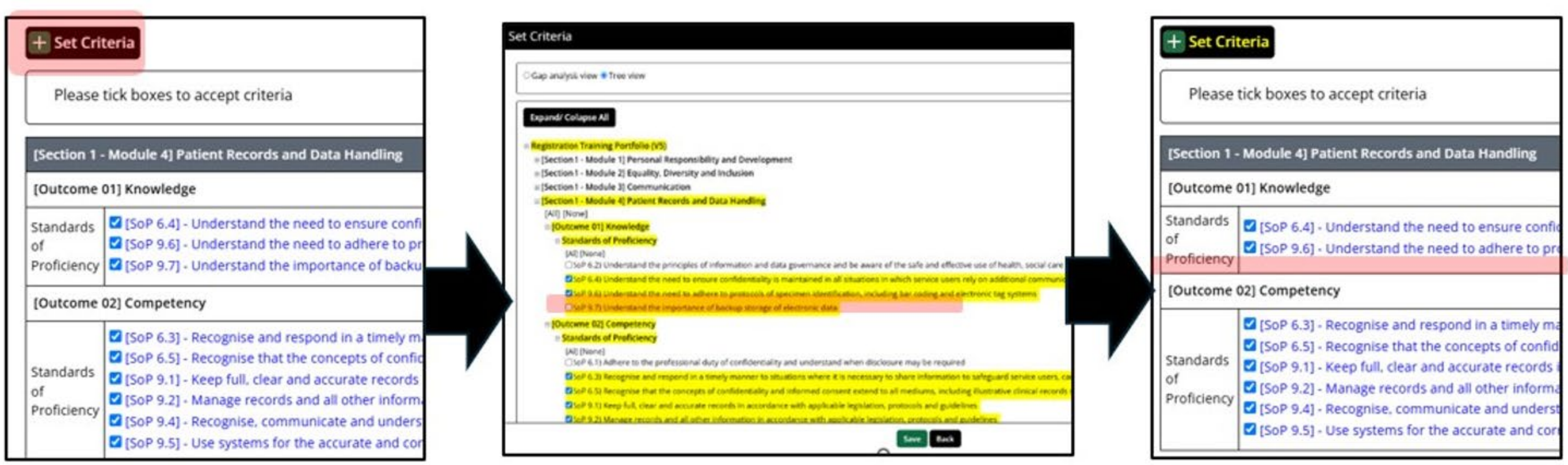
It is not possible for the Centre Manager to know which assessment criteria are covered prior to the agreement of the evidence and submission. **Trainers will need to remove any assessment criteria not covered by CCR submissions and add any that are.**

1. Scroll to the criteria section in the assessment
2. Click **Set Criteria**
3. Expand the tree and check/uncheck the SoPs to reflect what is shown by the evidence

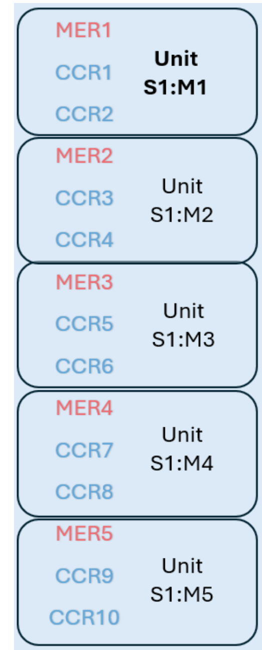
   Click **Save**, then **Back** to return to the assessment

   The SoPs associated with the assessment will have been changed.





4.4 Signing unit summaries



Each unit in the portfolio is composed of one mandatory assessment and two candidate choice assessments.

When progress within the unit reaches 100%, a task is automatically sent to the **default** trainer asking that the unit summary is signed. However, the unit may only be signed off if the rules for unit sign off are met.

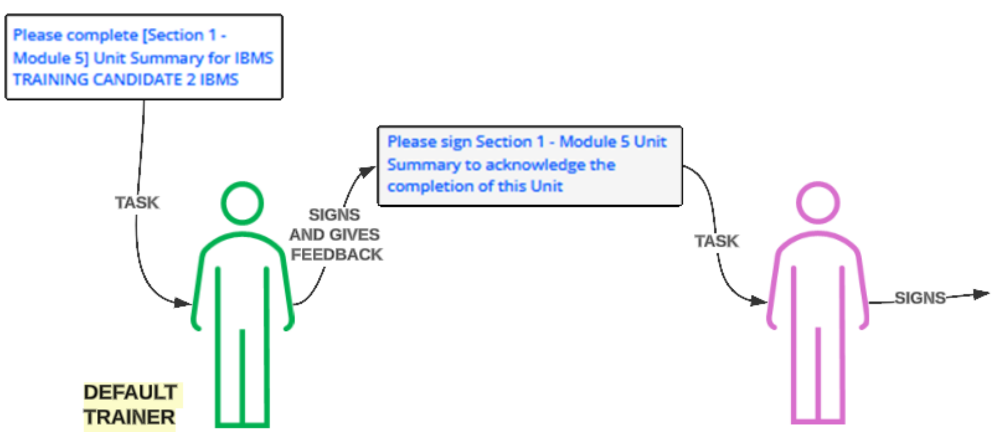
> ⚠ A red warning is shown if these rules have not been met.
>
> From the left side menu, see Resources > Support Tips! > Meeting the rules for unit sign off

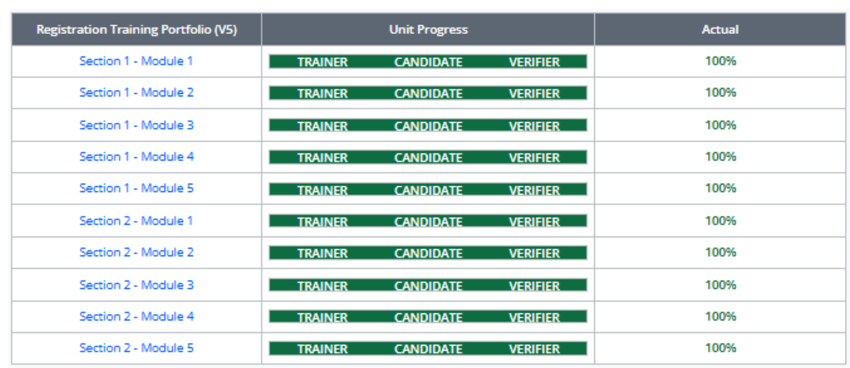
There are **two rules that must be met** before a unit can be signed by the trainer and candidate:

1. Each SoP must be evidenced
2. There must be **three** distinct pieces of evidence in each unit

As shown below, the trainer and candidate in turn receive a task asking them to sign the unit summary.

The trainer must provide feedback before signing. Unit summaries can be accessed by any user at any time by **clicking on any progress %** in any menu, dashboard or tile.





Registration Training Portfolio (V5)	Unit Progress	Actual
Section 1 - Module 1	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 2	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 3	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 4	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 5	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 1	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 2	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 3	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 4	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 5	TRAINER CANDIDATE VERIFIER	100%

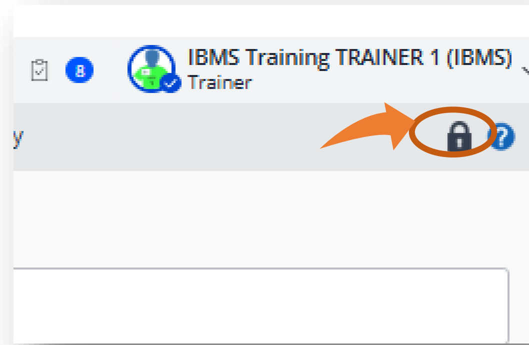
4.5 Unlocking a signed-off assessment/unit

▶ **REFER TO TRAINING VIDEO 6**

Signing an assessment (or unit summary) locks it and makes it un-editable by you. The item is moved onto the next step in the workflow.

Trainers and **verifiers** can unlock items.

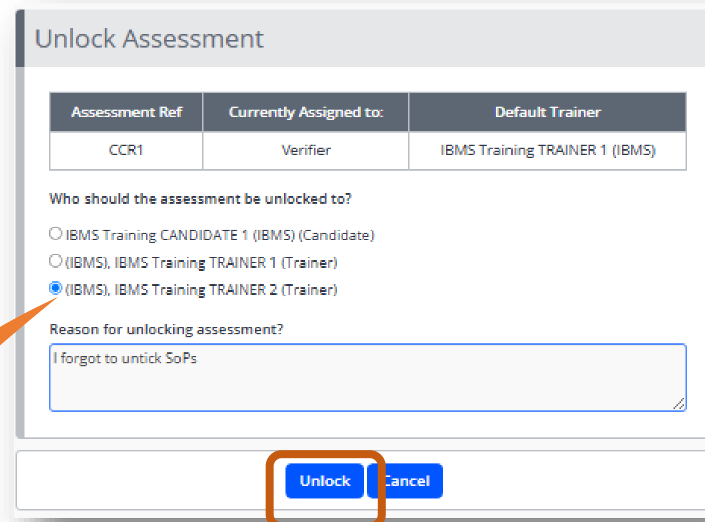
For example, a trainer may wish to adjust the SoPs in an assessment that they have previously signed off. A duplicate assessment may need to be deleted.



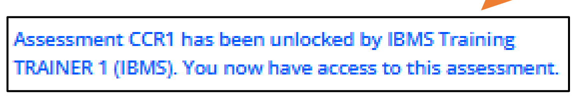
1. Locate the assessment (see Section 2.6): Open the candidate's portfolio from the trainer or verifier dashboard
2. Click on the **Assessments** tile
3. Select the assessment you want to unlock. You may need to change the Show dropdown to 'Completed'
2. Click the **padlock icon** in the top right corner of the assessment (or unit summary)
3. Select the user who the assessment should be unlocked

   If no users are visible, you do not have the permissions to unlock. If you are a trainer, ask the verifier to unlock. If you are a verifier, contact eLearning@ibms.org.
4. Provide a brief reason that explains why you are unlocking the assessment
5. Click **Unlock**.

   <u>To unlock an assessment in a unit that has itself been signed off, you will first need to unlock the unit summary.</u>



After unlocking, the selected user will receive a task notification, allowing them to access and make changes to the item.

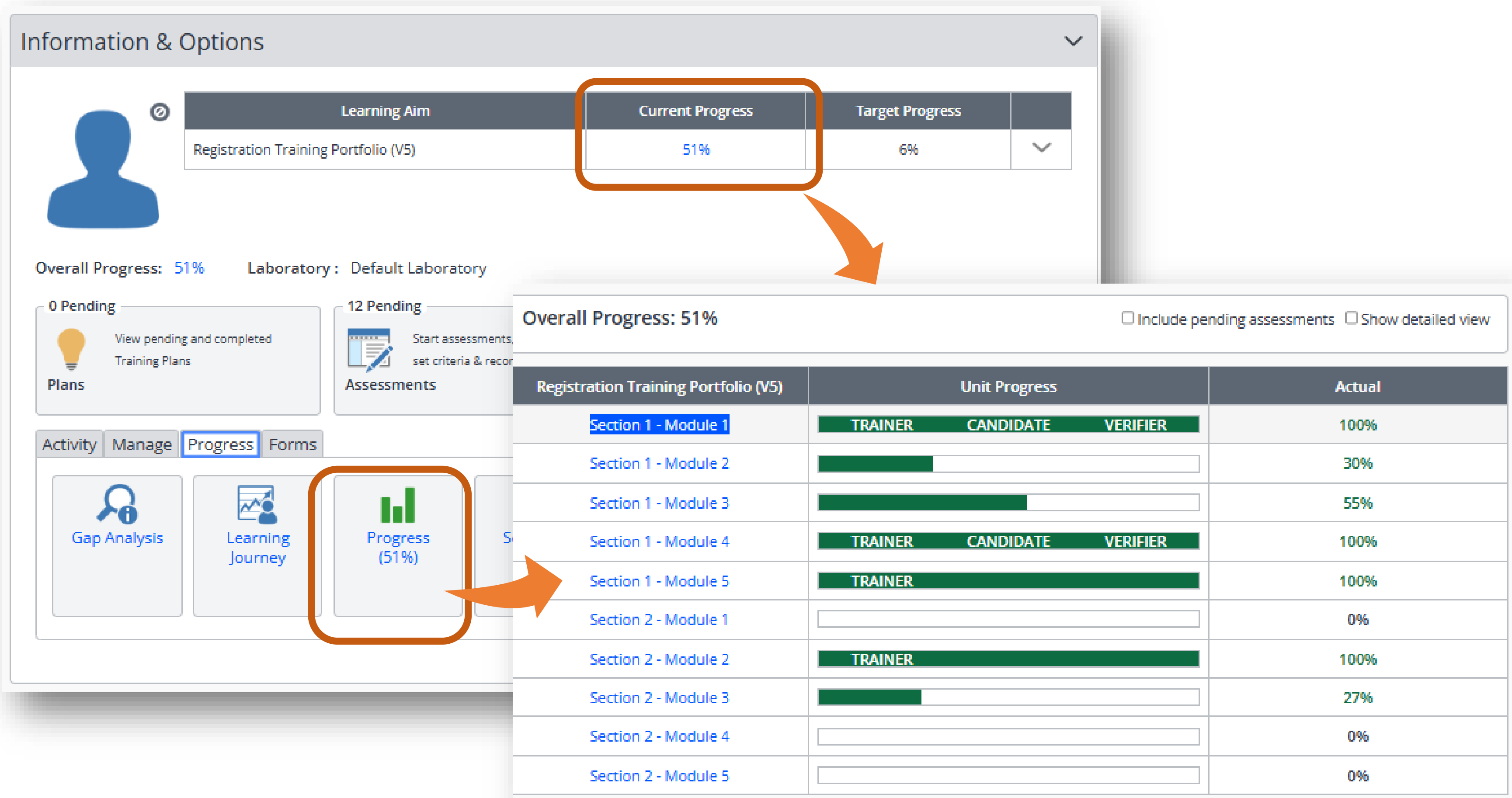


5 Managing progress

5.1 Overall progress

Progress in OneFile is measured against SoP completion. Progress at unit level can be viewed by clicking on **any % Progress** in any menu, dashboard or tile. Scroll down a unit summary to drill through to the assessments the unit contains.

The **Assessment list** gives a very useful holistic view across the portfolio of where each assessment **is currently located and its status** (see Section 2.6).

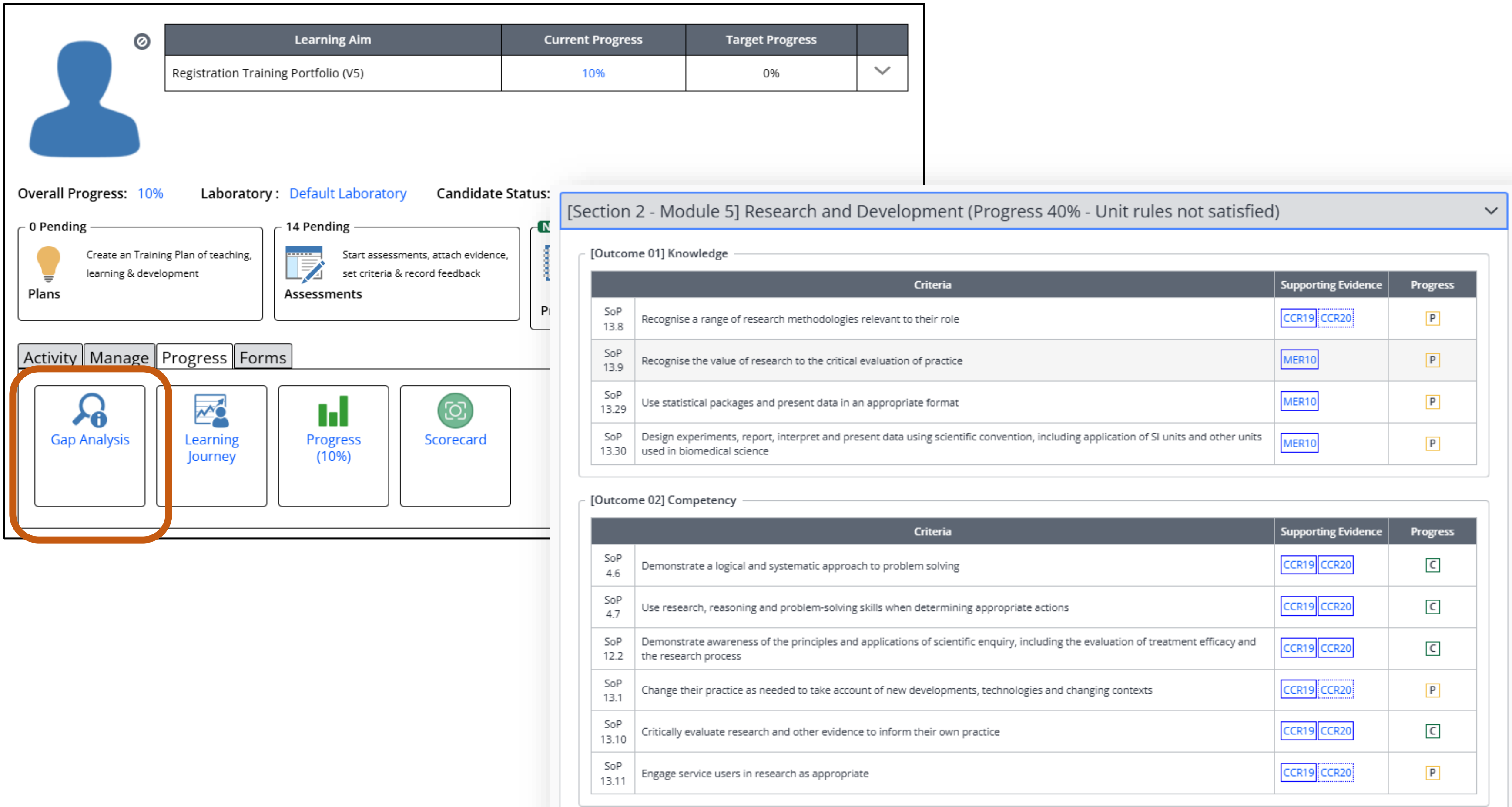


5.2 Gap analysis

▶ REFER TO TRAINING VIDEO 5

The Gap Analysis tool allows any user to view the portfolio from a SoP perspective.

We recommend that trainers use this feature pre- and post-marking to identify potential evidence gaps.



6 Verification

▶ REFER TO TRAINING VIDEO 7 and USER GUIDE FOR VERIFIERS

The purpose of verification is for the candidate to demonstrate their understanding of the HCPC standards of proficiency (SoPs).

Scrutinising the digital portfolio of evidence is one part of the verification process.

It is the candidate's choice whether the verification is conducted in-person or virtually. Regardless of the format, the verifier will have immediate access to the full candidate portfolio as soon as they have been assigned to the verification. It is therefore likely (but not a requirement) that the verifier will have reviewed the evidence in the candidate's portfolio in advance of the verification visit/meeting.

verification		
Digital portfolio SoP scrutiny	**Laboratory tour**	**Informal interview with candidate**

- During the scrutiny of evidence, the verifier's actions may generate tasks that are sent to the trainer.

- All '**paperwork' associated with the verification** is **created** and **signed** digitally in OneFile.
  Trainers, candidates and verifiers are sent a notification task when there is a form to review and sign (see Section 6.3).

- The result of the verification is reported automatically by OneFile.

During verification, the verifier:

Logs into OneFile using a verifier profile which gives access to the **unit sampling**	Accesses each assessment in turn through the **unit sampling table**	**Reviews the evidence** against the required **SoPs** for the assessment	**Decides** which SoPs the evidence meets, ticking off those that are evident

Where the verifier decides that additional evidence is required to demonstrate a SoP, the verifier can ask for resubmission, returning the associated assessment to the trainer with feedback.

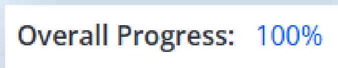
6.1 Pre-verification checks

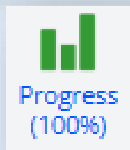
It is important to check that the **correct default trainer** is associated with the candidate. The default trainer is automatically sent the Verifier Report Form once it has been signed by the verifier. See Section 1.4 to view the candidate's training team and check that the default trainer is correct.

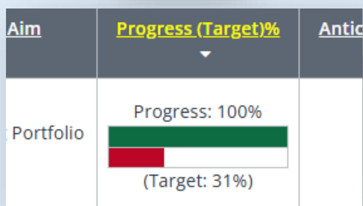
When the verifier has been assigned to the portfolio, only **fully signed off units** will be visible in their **unit sampling** table.

6.1.1 Checking that the portfolio is complete

CHECK 1: Is Progress 100%?







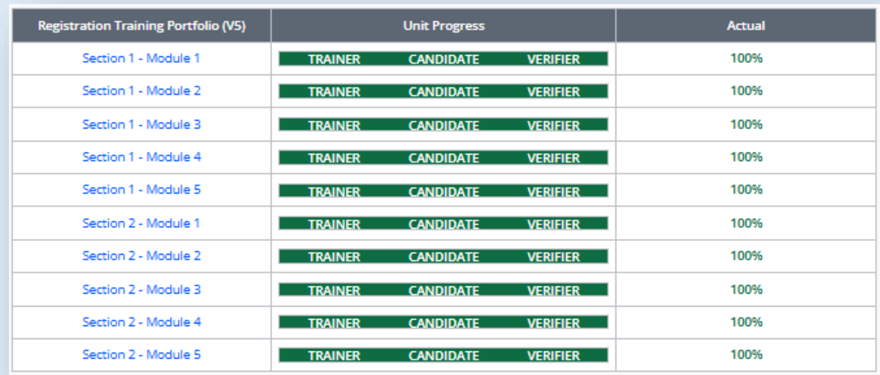
Not all the assessments in the portfolio have been signed off by either the candidate or trainer.

Check your task list—including hidden tasks—for any missed signatures. Review the Assessment list in the portfolio to determine the location and status of assessments.

In this context, ignore any target%. It is automatically calculated based on assessment dates set by your Trainer and your expected portfolio completion date.

CHECK 2: Does the unit summary page look like this?

(the text "TRAINER CANDIDATE VERIFIER" must appear every green bar)



Registration Training Portfolio (V5)	Unit Progress	Actual
Section 1 - Module 1	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 2	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 3	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 4	TRAINER CANDIDATE VERIFIER	100%
Section 1 - Module 5	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 1	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 2	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 3	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 4	TRAINER CANDIDATE VERIFIER	100%
Section 2 - Module 5	TRAINER CANDIDATE VERIFIER	100%

Even if the progress % is 100, all unit summaries must be signed off. Section 4.4 gives instructions on how to sign off a unit.

The ***Support Tip – Meeting the Rules for unit sign off*** also gives information

6.2 On the day of verification

On the day of verification, **the Trainer should ensure** that:

For virtual verifications:

- MS Teams/Zoom calls have been scheduled as appropriate and everyone notified in sufficient time
- The candidate has access to a laptop/PC to complete the verification in a quiet room with no distractions
- Provision has been made for the laboratory tour/video walkthrough to be undertaken without the presence of the trainer

For an in-person verification:

- The Verifier has access to a PC/laptop during the visit to review the candidate's portfolio and discuss the portfolio with the candidate during the visit.
- The candidate has access to a laptop in a to navigate through their portfolio to help them answering questions about the evidence it contains in a quiet room with no distractions

The decision regarding the success of the verification is at the sole discretion of the Verifier

6.3 After the verification visit/meeting

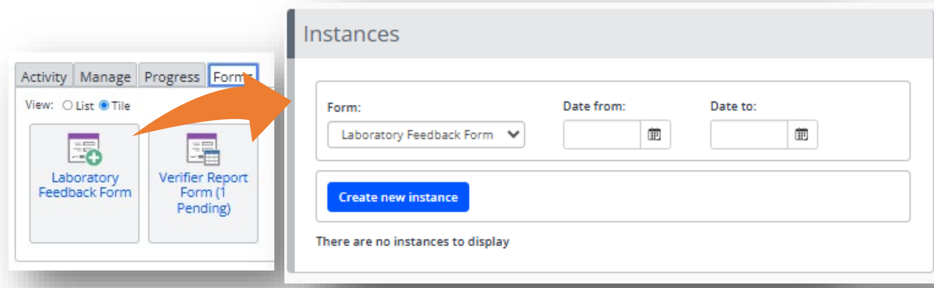
The trainer must:

1. **Agree the outcome** of the verification with the Verifier.
2. Ask the candidate to complete the confidential **Candidate Feedback Form** in OneFile
3. Complete and submit the **Laboratory Feedback Form**
4. **Sign the completed Verifier Report Form** to confirm they accept this as a true account of the process that took place.
   The VRF is created and signed by the verifier, triggering a task notification to the **default trainer** and then to the candidate.

Form	Created by	Signed by	Visible to
Verifier Report Form			Anyone associated with the candidate's portfolio
Laboratory Feedback Form			Anyone associated with the candidate's portfolio
Candidate Feedback Form			The candidate and the IBMS

6.3.1 Creating the Laboratory Feedback Form

The Laboratory feedback form can be found in the **Forms** tab of the Information and Options section of the candidate's portfolio.

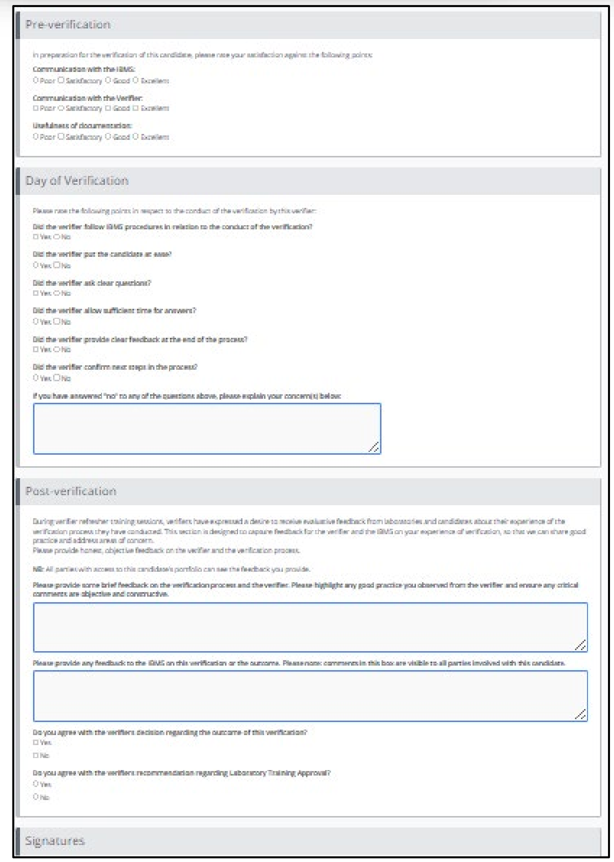


1. Navigate to the candidate's portfolio.
2. Click **Laboratory Feedback Form**
3. Click **Create a new instance**

   Ensure that the Form dropdown list is NOT set to "*all forms*"

   The New instance pop-up box suggests a name for the form.
4. Click **Create** to accept the suggested naming.

6.3.2 Completing the Laboratory Feedback Form



The form contains three sections:

- **Pre-verification** – collects information about making the arrangements for verification
- **Day of verification** – confirmation that the Trainer agrees a fair and due process
- **Post-verification** – feedback on the verification, the process and the Institute

The Laboratory feedback form can be started before the verification event and saved for completion and sign-off later.

Once signed by the trainer it is sent to the verifier and then the candidate for signing. All users associated with the candidate can see the completed laboratory feedback form.

6.3.3 Creating the Candidate feedback form

1. Goto the Forms tab in your portfolio.
2. Click **Candidate Post-verification Feedback Form.**
3. Click **Create new instance**

   Ensure that the Form dropdown list is NOT set to "*all forms*"
   The New instance pop-up box suggests a name for the form.
4. Click **Create** to accept the suggested naming.

6.3.4 Completing the Candidate feedback form

The Candidate post-verification feedback form contains two sections.

1. Complete the form, providing an evaluation of your training as appropriate.

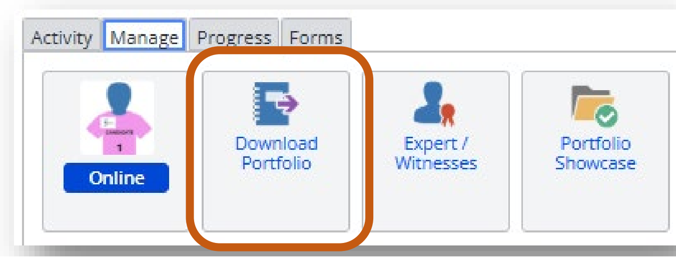
   Only the candidate and the IBMS can see this form, so <u>your feedback is confidential</u>

   Pass/fail decisions regarding your verification are at the sole discretion of the Verifier.
2. Tick the box to confirm your signature
3. Click **Save.**

6.4 Archiving the portfolio

The candidate user account and associated portfolio will be **archived** sometime after a successful verification.

- The candidate will be sent an email in advance to notify them that this will happen and advising them of any steps that need to be taken.
- Once archived, read-only access is retained to the portfolio by everyone associated with it.
- Candidates will have perpetual access to their portfolio directly through OneFile.
- We recommended setting up the portfolio with a **personal candidate email address**, so that access to the system is independent of workplace changes.
- The portfolio can be **downloaded** at any time.



The digital portfolio is complete, verified and archived!

7 Glossary

Term	Definition
AI detection	A feature of Turnitin that flags content likely generated by AI tools, visible to trainers and verifiers.
APL (Accreditation of Prior Learning)	This prefix is used for assessments specifically designed for candidates on the equivalence route. These assessments allow candidates to demonstrate prior learning or experience that meets the required SoPs. Non-equivalence candidates should not have APL assessments in their portfolio.
Archiving	The process of locking a completed portfolio after verification. It becomes read-only but remains accessible to all associated users.
Assessment	A digital structure within OneFile used by candidates to submit evidence. Each assessment is linked to a module and mapped to specific HCPC Standards of Proficiency (SoPs).
Assignments	Also called assessments, these are digital containers where candidates submit evidence mapped to specific SoPs.
Candidate choice assessments (CCR)	Optional assessments within each module that allow candidates and trainers to tailor evidence submissions to individual learning experiences.

Term	Definition
Dashboard	The main workspace in OneFile, tailored to your role (candidate, trainer, verifier), showing tasks, progress, and quick links.
Criteria	In OneFile, criteria refer to the specific HCPC Standards of Proficiency (SoPs) that each assessment is mapped to. Trainers use these criteria to evaluate whether the evidence submitted by a candidate demonstrates the required knowledge and competence. In candidate choice assessments, trainers can adjust the mapped criteria to better reflect the evidence presented.
Default Training	A standardised training plan provided by IBMS that includes a fixed set of 15 assessments per section, aligned with the HCPC Standards of Proficiency (SoPs). These plans are structured to ensure comprehensive coverage of required competencies and are intended to be used before developing any custom training plan.
Digital signatures	A tick-box mechanism used throughout OneFile to confirm authenticity and completion of tasks, replacing physical signatures.
Evidence	Documentation submitted by candidates to demonstrate competence, which can include text, uploaded files, or imported documents.

Term	Definition
Feedback & comments	A section in each assessment where trainers provide feedback and candidates can respond or justify their submissions.
Gap analysis tool	A tool that shows which SoPs have been covered across the portfolio and highlights any gaps in evidence.
HCPC standards of proficiency (sops)	Regulatory standards that candidates must demonstrate through evidence in their portfolio to meet professional requirements.
Keychain account	A central login that links all OneFile profiles associated with the same email address, allowing users to switch between roles (e.g. trainer, verifier) without separate logins.
Login	The process of accessing OneFile using your registered email and password via the OneFile portal.
Marking	The process by which trainers review submitted evidence, assess it against mapped SoPs, and provide feedback.
MER (Mandatory Evidence Requirement)	This refers to Assignment One in each module, which is pre-defined and used to collect the mandatory evidence required for that module. These assessments are fixed in structure and must be completed as written. Trainers can add SoPs to MERs but cannot remove any

Term	Definition
Modules	Thematic groupings of assessments within the training plan, each aligned to a specific area of professional practice.
Plagiarism	The act of presenting someone else's work as your own. In OneFile, this results in portfolio failure and the need to restart.
Progress tracking	A visual representation of how much of the portfolio has been completed, based on SoPs evidenced and assessments signed off.
Sidebar menu	A vertical navigation panel on the left side of the screen that provides access to key features like tasks, assessments, messages, and resources.
Tasks	Action items generated by OneFile to guide users through the portfolio process, such as accepting plans or reviewing feedback.
Templates	Predefined training plans created by IBMS that trainers can assign to candidates, containing a fixed structure of assessments.
Training plan	A structured set of assessments assigned by a trainer to a candidate, aligned with HCPC Standards of Proficiency (SoPs).
Turnitin	A plagiarism detection tool integrated into OneFile that checks uploaded evidence for originality and AI-generated content.

Term	Definition
Unit	A grouping of three assessments—one mandatory and two candidate choice—within a module. A unit is considered complete when all three assessments are signed off and all associated SoPs are evidenced. Trainers and candidates must both sign the unit summary before it proceeds to verification.
Unit summaries	Summative overviews of each module, signed by both trainer and candidate once all associated assessments are complete.

Term	Definition
Unlocking assessments	A feature that allows trainers or verifiers to reopen completed assessments for editing or correction.
Verification	The final review process where a verifier checks the portfolio to ensure all SoPs are met before sign-off.

8 Checklists

Candidate checklist

Access & Login

☐ I have received my OneFile account activation email (check spam/junk folders) (Section 1.1).
☐ I have set up my Keychain account and can access OneFile via https://login.onefile.co.uk

Profile & Notifications

☐ I have updated my profile information (Section 1.6).
☐ I have set a personal email address that I regularly check (for password resets and notifications).
☐ I have configured email alerts to receive a daily digest on my working days.

Orientation & Navigation

☐ I have watched the IBMS Training Videos (via the Resources tab in OneFile) and read the User Guide.
☐ I understand how to access: My Dashboard, my Portfolio, Assessments, Task List and my Progress.
☐ I can view my training team.
☐ I understand the different roles on OneFile and how each interacts with my portfolio.

Training Plan Awareness

☐ I understand that I must receive a Training Plan from my Trainer before I can begin to submit evidence.
☐ I know how to accept the training plan once it appears in my task list (Section 2.5).
☐ I understand that assessments are created once I accept the training plan.
☐ I know what the default structure of the portfolio is and understand the difference between MER, CCR and APL assessments.

Evidence Preparation

☐ I understand what is meant by 'a piece of evidence'.
☐ I understand how to add evidence using Word import, direct input, or upload (Section 3.2.1) and the differences between these methods.
☐ I know where to add my justifications for my evidence (Section 3.2.2).
☐ I am aware that plagiarism declarations are used and that I must clearly reference any sources I use.
☐ I know how to upload a submission to the similarity checking software, Turnitin.

Portfolio Progress

☐ I understand that the Assessment list shows the status and location of all my assessments.
☐ I can use the Gap Analysis tool to proactively check which SoPs are evidenced where (Section5.2).
☐ I know that my trainer can unlock assessments or units if amendments are needed (Section 4.5).
☐ I know how to download a copy of my portfolio once my account has been archived (Section 6.46.4).

Verification

☐ I know how to prepare my portfolio for a virtual or in-person verification (Sections 6.1.1).
☐ I know what forms I am expected to create and sign as part of verification.

Support & Resources

☐ I know how to contact elearning@ibms.org for technical/systems issues.
☐ I know how to access the Module Descriptors, User Guide, Support Tips and video playlist from within OneFile.

Trainer checklist

Access & Profile Setup

- ☐ I have received and accepted my OneFile account invitation email.
- ☐ I have successfully set up my Keychain account and logged in via https://login.onefile.co.uk.
- ☐ I have selected the correct Trainer profile from the OneFile landing page (applies if I also have a verifier profile).
- ☐ I have configured email alerts to receive a daily digest on my working days (Section 1.6).

Understanding Roles & Responsibilities

- ☐ I understand the different roles in OneFile.
- ☐ I understand my role in assigning training plans, reviewing evidence, providing feedback, and signing off assessments and unit summaries (Sections 2.3, 3.6, 4.2, and 4.4).
- ☐ I know which candidates I am the trainer for and how to view my candidate list (Section 1.4).

Training Plan Management

- ☐ I understand how to assign default training plans and the difference between MER, CCR and APL assessments (Sections 2.2).
- ☐ I know how to set and stagger start/end dates for each assessment to support manageable candidate progression.
- ☐ I understand the structure of the default training plans and the assessments within them (Section 2.2.1).

Marking & Feedback

- ☐ I understand that evidence can be added using Word import, direct input, or upload (Section 3.2) and the differences between these methods.
- ☐ I know how to open, assess and annotate submitted evidence (See Sections 3.2 and 4.2)
- ☐ I understand how to check and amend SoP mapping, especially in candidate choice assessments (Section 4.3).
- ☐ I provide constructive, specific feedback and ensure the candidate acknowledges it (Section 3.6).
- ☐ I understand that authenticity declarations are made when I sign an assessment (Section 3.4).
- ☐ I know that I trainer can unlock assessments or units if amendments are needed (Section 4.5).

Portfolio Progress

- ☐ I understand that the Assessment list shows the status and location of all assessments in a candidate's portfolio.
- ☐ I can use the Gap Analysis tool to proactively check which SoPs are evidenced where (Section 5.2).
- ☐ I know that after successful verification the candidate will be archived and what this means (Section 6.4).

Verification

- ☐ I know how to sign off unit summaries to ensure the portfolio is ready for a virtual or in-person verification (Sections 6.2and 6.3).
- ☐ I know what forms I am expected to create and sign as part of verification.

Support & Resources

- ☐ I know how to access IBMS video tutorials, user guides, module descriptors and support tips from within OneFile.
- ☐ I know how to contact elearning@ibms.org if I need technical support.