



CERTIFICATE OF COMPETENCE BY EQUIVALENCE PORTFOLIO

*Frequently Asked
Questions*

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ABOUT THIS VERSION

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Overview of the Route

What pieces of evidence are required in the Certificate of Competence by Equivalence Portfolio?

The portfolio is split into 2 sections that contain 5 modules each. The HCPC Standards of Proficiency (SoPs) in each module can be evidenced well in three pieces of evidence, giving 30 pieces of evidence in total across the portfolio. Recognising that candidates for this route to registration may have significant experience and expertise that they wish to include in the portfolio to demonstrate how they meet the HCPC SoPs, there is flexibility to include up to 5 evidence pieces per module, but this may not be necessary.

Each piece of evidence per module is a free choice to be agreed by the candidate and mentor but must adequately demonstrate the HCPC Standards of Proficiency mapped to each module. Producing a variety of evidence types across the modules demonstrates good practice and examples of evidence types that could be used across the portfolio can be found in the *Module Descriptor* document for this route.

Who can complete the IBMS Certificate of Competence by Equivalence Portfolio?

Candidates for this route must demonstrate that they have at least three years of autonomous professional practice related to biomedical science and experience that includes the routine analysis of specimens from patients to provide data for disease diagnosis and healthcare of the patient. Less than three years will be deemed inadequate for the application of equivalence.

IMPORTANT: Please note that applicants who have only worked as biomedical support staff/associate practitioners are not considered to have experience of autonomous practitioners.

Does the candidate need to be in a trainee position?

The candidate does not need to be in a trainee biomedical scientist role but must be able to demonstrate that they have at least three years of autonomous experience and routinely complete procedures and laboratory-based roles equivalent to those of a registered biomedical scientist.

The candidate must be able to evidence that all the HCPC standards of proficiency for biomedical scientists have been met through their portfolio evidence. The term “candidate” is used to refer to the individuals undertaking the mentoring required to successfully complete the portfolio. The candidate does not need to be in a funded trainee biomedical scientist post but must have a structured personal development plan and the time and ability to complete any additional training and / or rotations required to produce evidence to demonstrate they meet all the HCPC Standards of Proficiency.

Can someone who has completed a non-accredited degree complete the Certificate of Competence by Equivalence portfolio?

Yes, provided they are successful in their application to the route and can evidence that they have three or more years of autonomous practice. For this route to registration, the applicants need to have successfully completed a relevant BSc (Honours) degree and their degree certificate must be provided at the point of application. They may have also completed a MSc or PhD and evidence of these postgraduate qualifications should also be provided at the point of application.

There is no requirement to complete an IBMS degree assessment to identify areas of supplementary education required to undertake this equivalence route to registration as a biomedical scientist. Candidates completing the route will be provided with learning resources from the Institute to support their learning across the different clinical specialisms.

Can candidates in special reference laboratories complete this route?

Candidates can undertake this route in any biomedical science service laboratory that holds IBMS training approval if they can still evidence knowledge and practical competences relevant to all HCPC standards of proficiency for biomedical scientists. If candidates need to be seconded to another laboratory to complete particular pieces of portfolio evidence, formal arrangements must be in place and detailed in their personal development plan.

Can the Certificate of Competence by Equivalence portfolio be completed in more than one laboratory? I have moved jobs halfway through my portfolio.

A candidate can transfer to another IBMS approved training laboratory while completing the Certificate of Competence by Equivalence Portfolio. However, the laboratory which applies for the portfolio assessment is responsible for ensuring that the candidate has achieved all the HCPC standards of proficiency and has completed the required evidence to the appropriate standard. The laboratory may wish to request that certain pieces of evidence are re-done and countersign any relevant sections of the portfolio already completed prior to submission of the portfolio for assessment.

How long do I have to complete the Certificate of Competence by Equivalence Portfolio?

Your portfolio of evidence should be submitted before or on the day of your given submission date. This will be 12 months (one calendar year) after the issue of your digital portfolio to you. The submission date will be confirmed with you when the portfolio is issued. Your portfolio evidence is expected to be updated or produced within three years of the submission date.

Can I submit my portfolio before the submission date?

Yes: You can submit your portfolio prior to the submission date if it is complete and all evidence has been signed and dated by you and your mentor / other laboratory colleagues (if appropriate). You and your mentor are responsible for ensuring that you have submitted all the required information and evidence in an appropriate format so that it is easy to locate and review by the portfolio reviewers.

Can the portfolio be transferred to another candidate?

No, the portfolio is not transferable to another candidate.

About Evidence

Who signs off the pieces of evidence?

The mentor is responsible for ensuring that all evidence is signed off appropriately in the portfolio.

Other colleagues may sign off certain pieces of evidence if appropriate, including the sample reception manager, training manager, or other biomedical scientists and clinical scientists in the laboratory who have mentored the candidate to complete a piece of evidence. The named mentor should be satisfied that any delegated responsibility for signing off evidence is carried out properly and in accordance with safe, effective practice and to the level expected of a threshold level biomedical scientist.

Is it only the mentor who can sign off evidence in the portfolio?

No, it should be the most appropriate person. The mentor is responsible for ensuring that whoever is supporting the candidate to complete a piece of portfolio evidence fully understands the level and requirements expected. When the OneFile portfolio is applied for, a list of 'key' signatories should be included for any colleagues who will be signing off pieces of evidence. This means that the review panel can check that the most appropriate person has signed off the evidence as meeting the mapped HCPC standards of proficiency.

The final sign-off to confirm that the portfolio of evidence on OneFile is complete will be the named mentor in the original application for the Certificate of Competence by Equivalence Portfolio. If this

person changes during the portfolio completion, you will need to notify the Education Team using the equivalence@ibms.org inbox.

My candidate insists on preparing multiple examples of evidence. What shall I do?

As the registered professional and mentor, you should advise the candidate to select the best example of evidence to meet several competencies and HCPC standards of proficiency. Use negotiation skills to come to an agreed way forward for each of the pieces of evidence to be included in the portfolio. It is important that the candidate has ownership of the evidence they produce, but equally they should understand what form that evidence should take, and why.

OneFile has been set up to only accept three to five pieces of evidence (mapped to the necessary HCPC SoPs) per module. Additional pieces of evidence cannot be submitted for assessment.

As each piece of evidence should map to defined HCPC SoPs, how big should a single piece of evidence be?

Both the candidate and mentor should be thinking 'quality rather than quantity'. Each piece of evidence should be valuable and relevant to the HCPC SoPs it is mapped to but also concise. It is an important skill as a scientist to be able to explain complex information in a clear and concise manner to a variety of audiences. All candidates will have completed a BSc degree programme and should be proficient in creating a variety of materials for assessment including posters, presentations, case studies, data analysis and scientific pieces of writing.

Examples of evidence types per module of the Certificate of Competence Portfolio are given in the *Module Descriptor* document for this route.

For Section 2 Module 5 (Research and Development) the candidate should not include their research project from the final year of their degree programme in its entirety as a piece of evidence. They should include a short, written report on a workplace-based activity or project (or summarise their final year university research project) to include statistical analysis, data interpretation and evaluation of the study design.

Should the candidate include essay style evidence?

No. Rather than including long written pieces of work as evidence, the candidate should focus on pieces of evidence that are clearly linked to their own experience and practice. Short reviews or executive summaries of information they have read or the use of diagrams or flow charts of work they have completed could be good examples of evidence. Alternatively, a reflection on what they learned from a presentation or training course they have attended and how they will apply this to their practice is better than including just the slides or certificate of attendance as evidence. The candidate should reflect on how they will incorporate what they have learned into their practice and / or use the activity summarised in the piece of evidence to address a gap in their skills or knowledge to enhance their laboratory-based practice.

If a piece of evidence is included that includes published material (scientific information from journal articles or textbooks, images or information from laboratory SOPs, manufacturer instructions or diagrams) that is not the candidate's, the sources should be clearly referenced using in text citations and a reference list at the end of the piece of work.

Pieces of evidence that include original photographs, data or images that are annotated, structured questions and answers, or case studies are not subject to the 1500-2000 word count, but should again be clear, concise and demonstrate the appropriate HCPC standards of proficiency.

Should the candidate include witness statements as evidence?

Witness statements are not good examples of evidence. The pieces of evidence should be selected by the candidate as the best evidence to show how they have demonstrated they meet the HCPC standards of proficiency. A witness statement that simply states someone else has watched the

candidate complete the task and is not a good piece of evidence.

A better piece of evidence would be a summary of a discussion with the person who observed the task being completed including feedback on what the candidate did well, some reflection on how they might improve next time and consideration of the following questions as prompts:

- What learning or competency development did the candidate undertake?
- What did the candidate learn or achieve through this activity?
- How has the candidate applied or will they apply this learning to their day-to-day practice?
- How could this developmental task change the candidate's practice to benefit the training laboratory or service user?

Is reflection required in the portfolio?

Yes, the expectation is that, as future biomedical scientists, the candidates will reflect on their skill development, competencies and future improvements in all their pieces of evidence. There should be evidence of reflection in the justification used for each piece of evidence throughout the portfolio, ie why the piece of evidence was chosen and how it clearly demonstrates the HCPC SoPs it has been mapped to.

Self-reflection is a skill that candidates should master early in their career.

Section 1 Module 5 (Professional Relationships) could contain a reflective statement that describes how the candidate's engagement with service users and colleagues has positively contributed to their professional development and maps to HCPC SoPs 8.1, 8.12 and 8.13.

Opportunities for candidates to demonstrate self-reflection might include a single reflection on going on a ward round, maybe working with point of care testing and talking about what they learned and how this contributed to their development, or it could be a reflective statement that talks about multiple examples of how the candidate's interactions with service users have improved their development. The candidate could include answering patient queries and clinician's queries and reflect on how this has improved their communication. Speaking to clinicians using clinical laboratory terminology but also being able to talk to patients (where applicable, e.g. instructions on collecting urine samples) show the candidate's ability to communicate with different people and use different language to communicate most effectively.

The candidate can discuss how service users adding on tests and querying sample requirements has improved their awareness of the tests the lab does, what tests are done by other departments, what specimen requirements are for tests they don't do very often (this could be a reflection on a mixture of specific and general tests). Finally, the candidate might have had to give results which helped their awareness of reference ranges or might have queried results with clinicians or discussed staining. All these activities involve interactions with service users outside of pathology and all contribute to the candidate's professional development.

There may be different types of evidence. How do the review panel know which are acceptable?

This involves applying professional, academic and lay person judgement. Each piece of evidence must be relevant to the HCPC standard of proficiency it is mapped to and authentic, showing that the candidate has met the standards in question. The rationale for the inclusion of each piece of evidence is supported by the justification for choosing the evidence presented.

The generic nature of the HCPC standards of proficiency permits different types of evidence to be acceptable.

How can one be sure about the validity of the evidence?

Evidence is produced as the candidate works through their portfolio development plan with their mentor, so a qualified individual will have had responsibility for assessing the piece of evidence prior to its inclusion in the portfolio. The candidate must sign and date the work and has completed a plagiarism statement that states all work included is their own.

There should be evidence of marking and constructive feedback from the mentor that underpins iterative improvements in each piece of evidence.

Finally, the mentor will have signed off the evidence and confirmed that the HCPC standard of proficiency have been demonstrated, as part of their professional responsibilities.

About Assessment

What should I do if I cannot submit my portfolio in time?

If you are not able to submit your portfolio on the given submission date for reasons beyond your control, you can request an extension through mitigating circumstances. You should contact the equivalence@ibms.org inbox to explain the issue and ask for an extension, including an email of support from your mentor. This request will be reviewed by the Education Team and elevated to the Executive Head of Education for a final decision.

The outcome will be provided to you by email, including any agreed extended submission date.

How do I submit my portfolio?

You and your mentor will be given access to the OneFile system that hosts the Certificate of Competence by Equivalence (Biomedical Scientist) portfolio. Once the portfolio is complete and all evidence has been checked and signed off by your mentor, they will confirm on the OneFile system that the portfolio is complete and requires assessment.

Information on this process is given at the launch event and also in guidance videos on using the OneFile system that are open access on the IBMS web pages:

<https://www.ibms.org/education/onefile/user-videos/>

OneFile learning week videos: <https://www.ibms.org/education/onefile/>

How soon after the submission of the portfolio of evidence will I know if I qualify for the viva assessment?

Once you have submitted your portfolio, your portfolio will be reviewed by the panel of three assessors to provide feedback and determine whether you can move on to the next stage of the process.

The review panel is selected from the IBMS pool of professional, academic and lay representatives who have been trained as assessors for the IBMS Certificate of Competence by Equivalence (Biomedical Scientist) route. The panel will be comprised of one professional and one academic assessor and one lay assessor.

The reviewers will check all pieces of evidence and judge if the HCPC standards of proficiency have been adequately demonstrated.

After all three reviewers have completed their portfolio evidence review, you will be informed if you are required to submit further evidence for your portfolio, or if you are able to proceed to the final assessment (the viva).

What happens during the viva voce assessment?

The viva voce (oral assessment) will be held with the professional reviewer to explore aspects of your knowledge and understanding of the HCPC standards of proficiency based on the evidence submitted in your portfolio. You will be asked questions related to your scope of practice and what you do in your current role that allows you to demonstrate that you meet the HCPC Standards of Proficiency for a biomedical scientist.

Your viva will normally last between 45-60 minutes and will be used to confirm your suitability for the award of the Certificate of Competence by Equivalence (Biomedical Scientist).

The professional reviewer will produce a report and a recommended outcome of the viva voce assessment for submission to the IBMS Education and Professional Standards Committee for ratification.

What happens if I fail the viva?

If you have successfully passed the portfolio assessment but are unsuccessful in the viva, you will be permitted one further opportunity to re-sit the viva voce. This will incur a charge of £150.

You will be given feedback from the assessor on the areas to focus on and improve before the resit viva and agree a timeline for the resit viva with the assessor.

If you fail the viva a second time, you will have failed to meet the requirements for the award of the IBMS Certificate of Competence by Equivalence (Biomedical Scientist).

Can I appeal my assessment outcome?

If you are unsuccessful in the viva assessment after 2 attempts, you will have the opportunity to appeal on procedural matters related to the assessment process.

Appeals must be made within 28 days of the applicant being notified of their assessment outcome. Appeals must be made in writing to the IBMS Executive Head of Education and clearly state the reasons for the appeal with supporting evidence where appropriate. Appeals will be considered by an appeals panel (including the external examiner and two HCPC registered members of the IBMS Council who are not associated with any aspect of the application).

How do I become registered with the HCPC as a Biomedical Scientist following successful completion of the equivalence route?

If you are successful in each stage of the process, you will receive your Certificate of Competence by Equivalence via post. A pass list will also be sent by the Education Team at the IBMS to the HCPC confirming your successful completion when issuing your certificate.

Once you have received your certificate in the post you can apply for HCPC registration as a biomedical scientist directly, citing the IBMS as your education provider on the application form. <https://www.hcpc-uk.org/registration/getting-on-the-register/uk-applications/>

Who will assess the reviewers?

The reports submitted by the review panel members follow a standard format. They are initially reviewed by staff in the IBMS Education Team, who will return any incomplete reports to the reviewers. In cases where there is an issue, further investigations will be undertaken, with the reports containing serious issues being elevated to the Education Manager and Executive Head of Education as required.

Sample review panel reports are submitted to the IBMS External Examiner as part of our annual quality assurance process.

All review panel members for this route to registration are required to undertake training (every 2 years) and remain active (completing at least 2 portfolio assessments per year) to remain in the IBMS Certificate of Competence by Equivalence reviewer pool.

What do I do if I feel uncomfortable in raising concerns via the portfolio review panel report documentation?

Minor concerns can be raised primarily within the scope of the documentation and in discussion with the mentor, but more serious concerns should be raised directly with the Education Team by contacting equivalence@ibms.org.

Can reviewers clarify that all HCPC standards of proficiency have been met via the portfolio evidence and the viva voce?

If the review panel feels that some of the HCPC standards of proficiency have not been adequately demonstrated in the pieces of evidence in the submitted Certificate of Competence by Equivalence Portfolio, it may be possible for the professional reviewer to ask targeted questions to obtain further information during the viva voce assessment. The duration of the viva allows the professional reviewer adequate time to ensure the candidate does meet the threshold standards to become registered as a biomedical scientist.

If the review panel do not feel that after reviewing the portfolio evidence that the candidate has met the threshold standards, they may advise that some pieces of evidence must be updated and resubmitted for them to review. Once they are satisfied that all standards of proficiency have been met, the review panel will be able to confirm that the candidate can proceed to the viva voce assessment.

If there are several areas of concern during the viva voce assessment and the professional reviewer feels that the candidate does not demonstrate that they meet all HCPC standards of proficiency, they may choose to fail the candidate and request a second viva voce. In this case, a new viva date will be agreed with the mentor and candidate that will give the candidate adequate time to update their knowledge, understanding and competencies to an appropriate standard.

Can the review panel be allowed to access the portfolio in progress?

No. The portfolio review is only organized once all pieces of evidence are complete and the portfolio is 100% complete with unit summaries signed off.

Plagiarism

If I think that the candidate's work is not their own, what should I do?

Any evidence of plagiarism will result in failure of the portfolio and the candidate will be required to complete a new Certificate of Competence by Equivalence Portfolio. If a mentor suspects plagiarism they are asked to 'call it out' and discuss this with the candidate. Mentors are bound by the HCPC Standards of Conduct, Performance and Ethics: "6.1 You must take all reasonable steps to reduce the risk of harm to service users, carers, and colleagues as far as possible. 6.2 You must not do anything, or allow someone else to do anything, which could put the health or safety of a service user, carer, or colleague at unacceptable risk".

How do we monitor plagiarism with OneFile?

OneFile has an integration with Turnitin. This can be used to check attached evidence for plagiarism. Turnitin is not currently available for imported evidence. From the left side menu in OneFile go to Resources > Support Tips > Support Tip - Turnitin for more information.

Does Turnitin look for the use of generative AI?

Yes, Turnitin's similarity report flags text that that might have been prepared by a generative AI tool such as large-language models, chatbots, and word spinners.

Is using copy & paste from SOPs (especially for evidence like Audit) plagiarism?

If you use the wording of the standard operating procedures in your evidence, which others have already used, it will result in a higher Turnitin score. Be able to justify the score. For example, did you quote the text for clarity? Use quotation marks around any quoted text and credit your sources.

What percentage is accepted on Turnitin?

Context is everything. A high score may be entirely justified. From the left side menu in OneFile go to Resources > Support Tips > Support Tip - Turnitin for more information.

Using OneFile

How is the training plan / personal development plan assigned and accepted?

Mentors assign a personal development plan using the IBMS template that contains a set of assessments. Once assigned, candidates must accept the plan by signing the declaration. This creates the assessments in the candidate's portfolio and sends tasks to their task list.

How do I submit evidence for an assessment?

Evidence can be typed directly, imported from Word, or uploaded as a file. A justification must be included, preferably in the Feedback & Comments section. Once ready, sign and submit the assessment to your mentor.

What happens if my mentor returns an assessment for revision?

You will receive a task in your task list. Review the feedback, make the necessary changes, and resubmit the assessment. The mentor will then reassess it.

How do I track my progress through the portfolio?

Use the Progress and Gap Analysis tools to monitor completion of SoPs and identify any gaps. You can also view the status of each assessment in the Assessment list.

What happens after my portfolio has been assessed?

The portfolio is archived and becomes read-only. You will retain access to it indefinitely. It is recommended to use a personal email address for your OneFile account to ensure continued access.

What is the difference between importing and uploading evidence?

Importing allows for mentor annotations and is ideal for drafts. Uploading supports Turnitin plagiarism checks. A hybrid approach is often recommended.

Once a portfolio is complete and has been fully assessed, can the mentor access it for reference later?

Yes, any user associated with the portfolio on OneFile (mentors, observers and reviewers) retain read-only access to the portfolio after the candidate has been archived. The candidate also retains read-only access. Provided they have access to the email they are registered with in OneFile, candidates will be able to access their work.

Where can I find additional support or training resources?

Resources are available on the menu in OneFile (select Resources from the left side menu) and on the IBMS website. For technical help, contact the IBMS Digital Education team at elarning@ibms.org

Deleting and Unlocking Assessments

How do I delete an APL assessment that has appeared for a candidate?

First make a note of the content and status of the assessment. Any links to attached evidence and any Feedback and Comments will be deleted. Go to the Candidate's portfolio > Assessments. Click on the assessment to open it. Follow the instructions in the Support Tip - Unlocking an assessment. Delete the assessment.

If you sign off a unit, can you access it again if needed, or is this a permanent step?

No, you can unlock it. Assessments, unit summaries and training plans are all entities that can be unlocked and edited. From the left side and menu in OneFile go to Resources > Support Tips > Support Tip - Unlocking an assessment. Only mentors can unlock items.

If your mentor signs off a unit, can they access it again if they need to?

Yes, it can be unlocked. From the left side menu in OneFile, go to Resources > Support Tips > Support Tip - Unlocking for more information.

Justifications and Reflections

Does the candidate need to write a justification and/or reflection?

Yes, justifications are needed. They should be included by a candidate as a comment in the Feedback and Comments section in an assessment. The justification should clearly explain why they have chosen the piece of evidence they have and how it demonstrates the HCPC SoPs listed against it.

If the Turnitin score is high, but there is good reason for this, does the justification have to be documented in the feedback?

It is always good practice to document any justification or reasoning for a high Turnitin score in the feedback and comments. It allows the reviewers to easily see the information and can act as an aide memoire to mentors if the review panel queries a high score.

Mentor Roles and Responsibilities

Is the named mentor the same as additional mentors?

In OneFile there are two types of mentor: the **default mentor** has overall responsibility for supporting the candidate to complete the portfolio. Multiple **additional mentors** who mark and sign off evidence can also be linked to the candidate's portfolio.

If an additional mentor is an associate practitioner or MLA (with no HCPC number) can they still be added to one file as a mentor?

OneFile has the capability to provide a workaround that involves a countersigning workflow. In certain circumstances, a non-HCPC registered mentor sign offs can be countersigned by a HCPC-registered user.

Must mentors be IBMS members?

Mentors must be HCPC registered (unless they are from a genomics laboratory and this has been agreed at the point of admission to the route); they do not need to be a member of the IBMS. However, if they are an IBMS member please quote this number in any correspondence with us.

Where can I find a candidate's "Training Team"?

From the left side menu in OneFile, go to Resources > Support Tips > Support Tip - Viewing the candidate's training team to see mentors assigned to the candidate. Ensure you have unchecked Simple View. An alternative method is to enter the portfolio from the floating "Portfolio" tab on the right side of the screen and click on the person icon. Candidates can see their mentors in the Assessment Team section of their Home dashboard.

Cross-Referencing and Mapping Evidence

If you can add SoPs for each piece of evidence, does that mean we can cross-reference evidence across different sections?

In the non-digital portfolio it was much more difficult to keep track of where SoPs were evidenced. There is nothing to stop you from mapping a particular piece of evidence to different SoPs, however you should justify this with a comment in the assessment's Feedback and Comments to show your thinking. From the left side menu in OneFile go to Resources > Support Tips > Support Tip - Changing SoP mapping to see step-by-step guidance on changing criteria mapping.

If a SoP has not been met for a piece of evidence uploaded to a specific module, but has been met by a piece of evidence in another module can these be linked?

Yes; you can add SoPs to pieces of evidence and SoPs can be re-mapped.

Is it sufficient if a SoP is only evidenced by one piece of evidence?

Each SoP needs to be evidenced by at least one assessment. Across the unit (e.g. S1:M4) three separate assessments must be used. From the left side menu in OneFile go to Resources > Support Tips > Support Tip – Unit Sign Off Rules for more information.

If I have uploaded evidence as MS Word documents, but now want to upload through the evidence text box (to use the annotation feature), can I delete the uploaded evidence and re-upload again?

Yes, but consider the value of doing this. If the portfolio is nearly complete and there is no substantive benefit, then it may not be worth it. If you are a candidate, remember that the method of evidence submission is decided by your mentor, and you should be guided by their requirements.