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REGISTRATION TRAINING PORTFOLIO V5.0

*OneFile User Guide for
Verifiers*

June 2025

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.

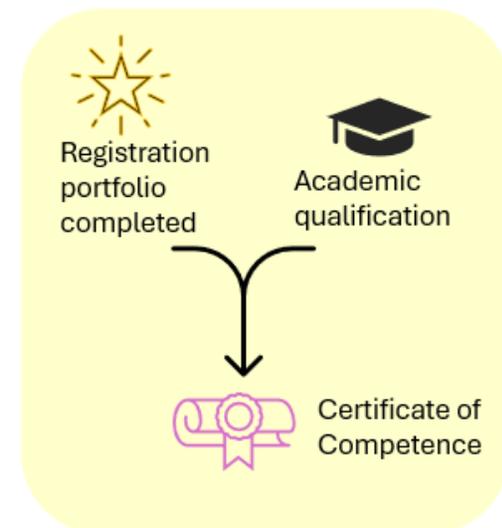


The portfolio of evidence is complete when it contains a set of assessments containing evidence that meets all the required HCPC SoP. At this point an application can be made to have the portfolio scrutinised by an external verifier.

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

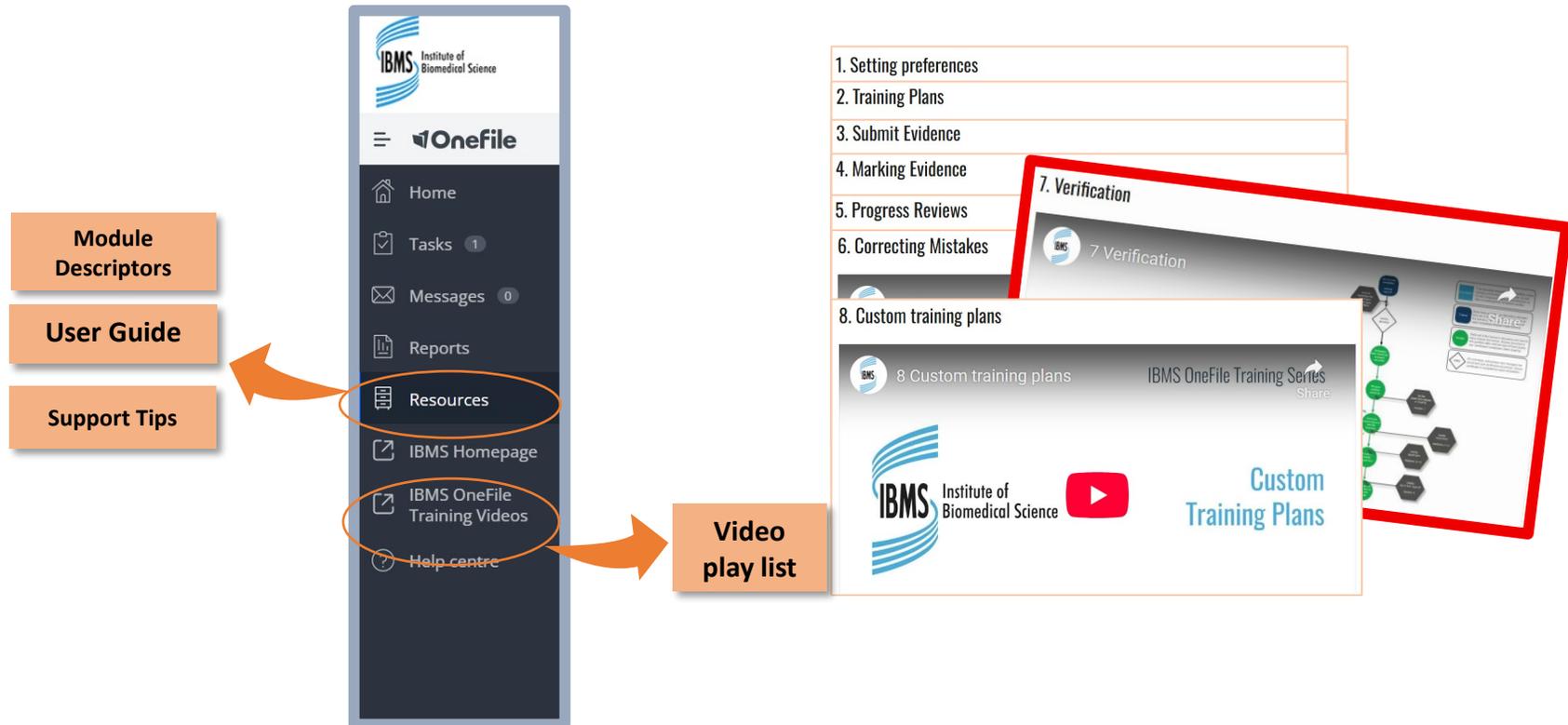
Following successful verification, the digital portfolio is archived.

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

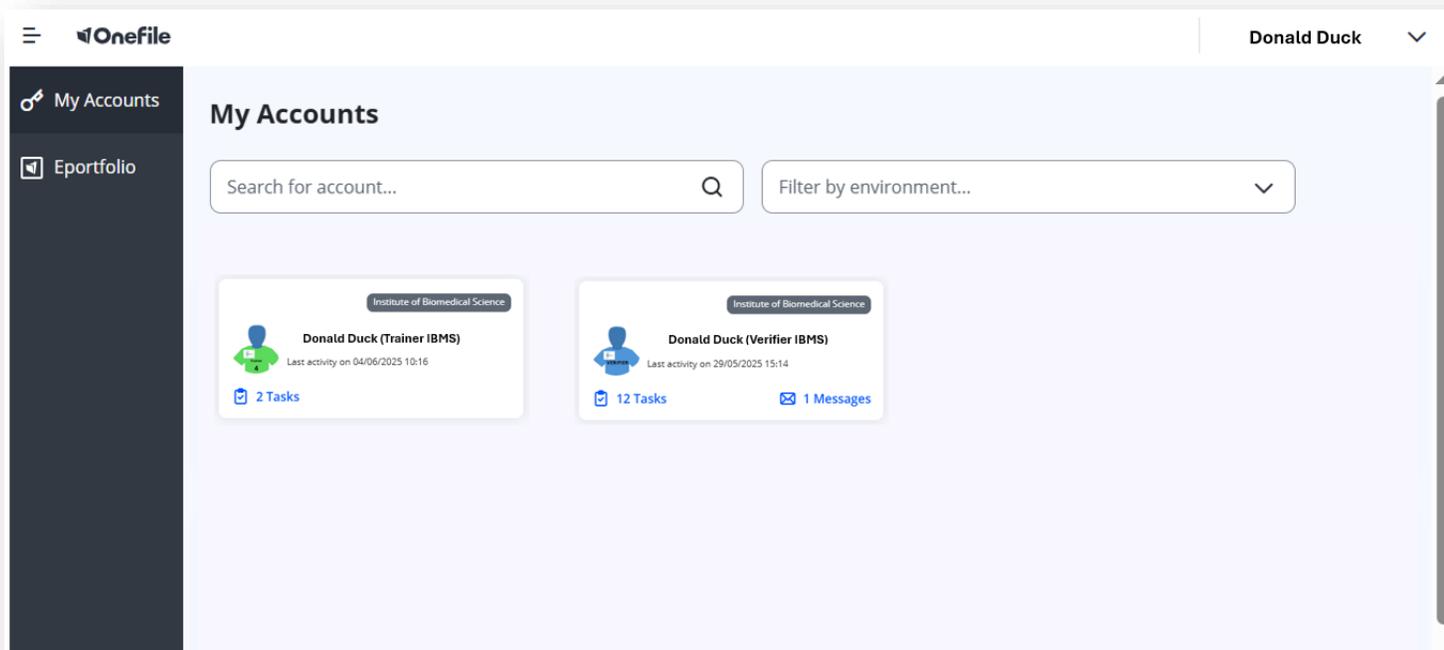
1.1 Keychain account

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:



1.1.1 The verifier dashboard

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



Dashboard
▼

TASKS DUE

Immediately: 1

This Week: 0

Next Week: 0

In 2 Weeks: 0

CANDIDATES DUE TO COMPLETE

None due in next 90 days

TRAINER VERIFIER RESUBMISSIONS

IBMS, IBMS Training TRAINER 1: 2

UNITS TO BE SAMPLED

Nothing planned in the next 30 days

Trainers
▼

Trainer (click for unit sampling) →	Date Last Login	Caseload	Tasks Outstanding	Units Resubmitted	Units Signed Off In Last 30 Days	Sampling Policy Compliance	Options
(IBMS), IBMS Training TRAI Online	04/06/2025 13:13	1	24	0	1		Training Plans Assessments Trainer Observations Journal
(IBMS), IBMS Training TRAI Offline	04/06/2025 10:46	0	0	0	0		Training Plans Assessments Trainer Observations Journal
(IBMS), IBMS Training TRAI Offline	03/06/2025 17:04	0	4	0	0		Training Plans Assessments Trainer Observations Journal
McLaughlin (Trainer 4 IBM) Offline	04/06/2025 10:16	1	2	0	0		Training Plans Assessments Trainer Observations Journal
Taylor (Trainer Support), JI Online	04/06/2025 13:08	1	1	1	0		Training Plans Assessments Trainer Observations Journal

Candidates
▼

Search part of name: Search Clear Include Archived Candidates

More VERIFIER Options
▼

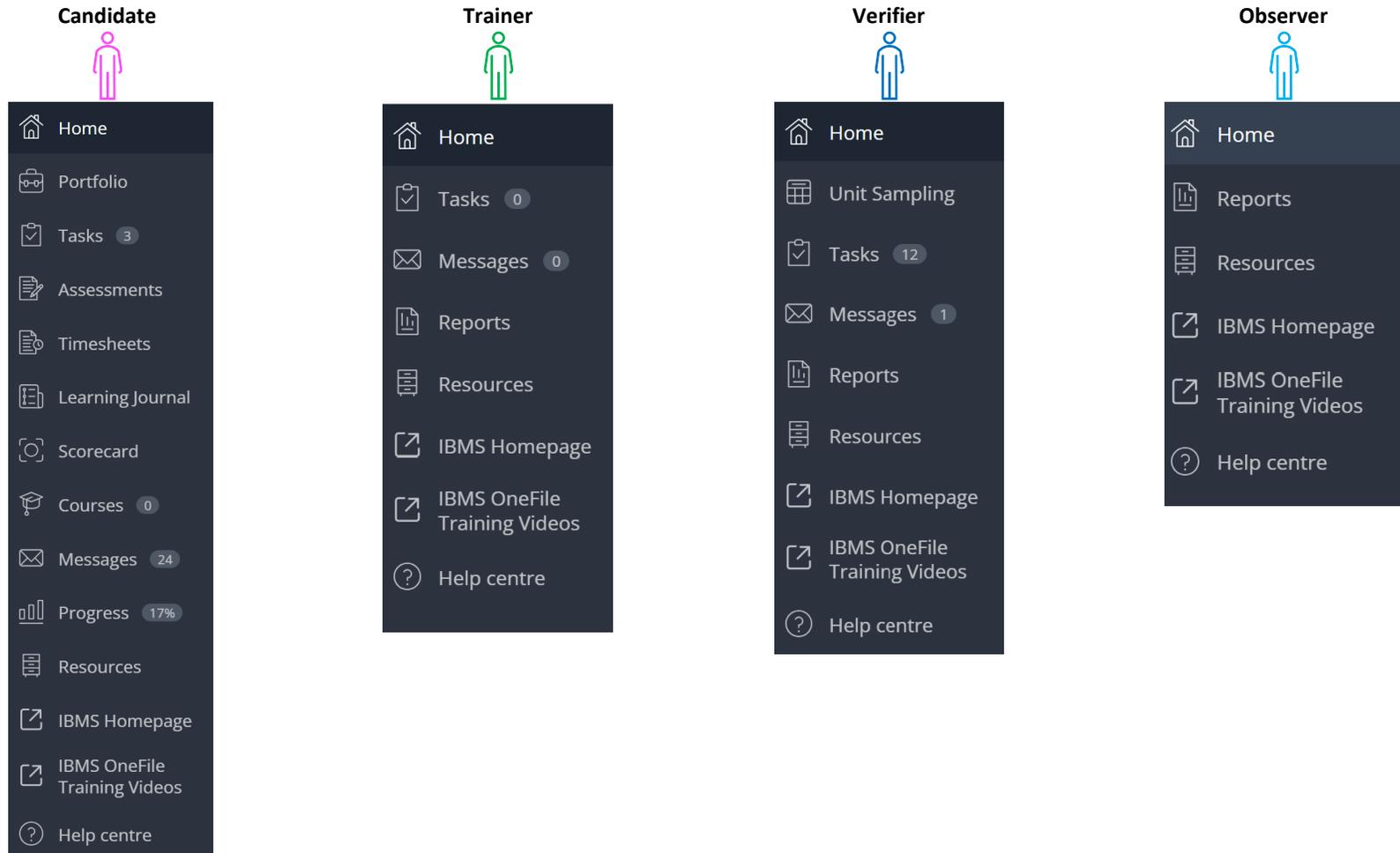
- [Training plan schedules](#)
- [Trainer observations](#)
- [Calendar](#)
- [Centre resources](#)

- [VERIFIER-ready assessments](#)
- [Candidate interviews](#)
- [Sampling policies](#)
- [Forms](#)

1.1.2 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.

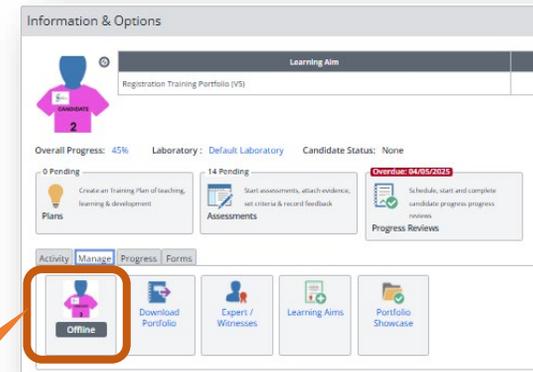
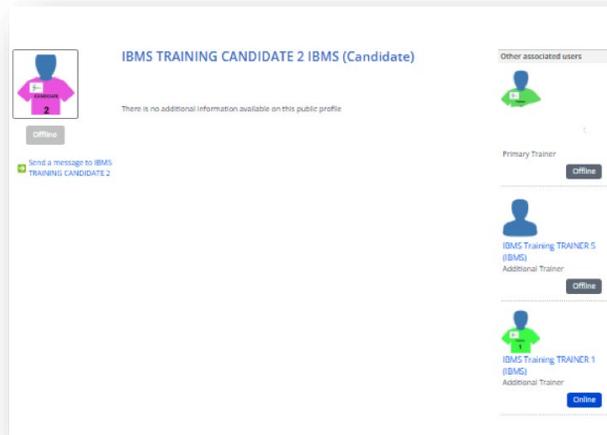


1.2 Viewing the training team

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



1.3 Unlocking a signed-off assessment/unit

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.

1. Locate the assessment: 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
3. Select the user who the assessment should be unlocked

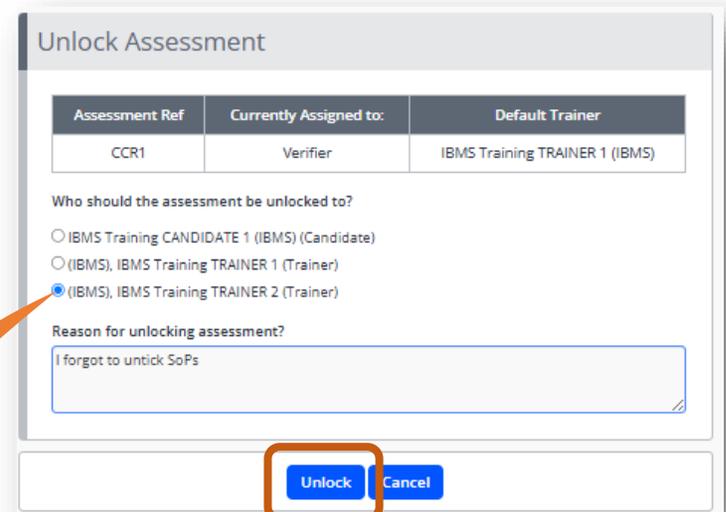
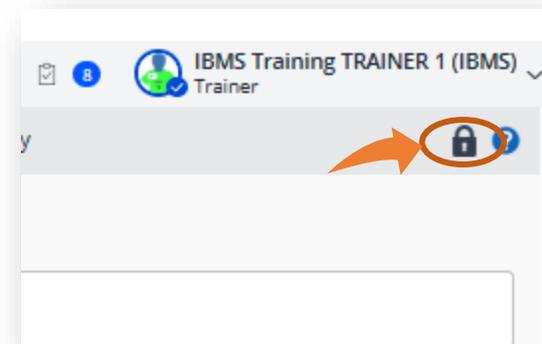
If no users are visible, you do not have the permissions to unlock. If you are a trainer, ask the verifier to unlock. If you are a verifier, contact eLearning@ibms.org.

4. Provide a brief reason that explains why you are unlocking the item
5. Click **Unlock**.

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

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

Assessment CCR1 has been unlocked by IBMS Training TRAINER 1 (IBMS). You now have access to this assessment.



Assessment Ref	Currently Assigned to:	Default Trainer
CCR1	Verifier	IBMS Training TRAINER 1 (IBMS)

Who should the assessment be unlocked to?

IBMS Training CANDIDATE 1 (IBMS) (Candidate)

(IBMS), IBMS Training TRAINER 1 (Trainer)

(IBMS), IBMS Training TRAINER 2 (Trainer)

Reason for unlocking assessment?

I forgot to untick SoPs

1.4 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.

1.4.1 Filtering tasks

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

Filter by: Period: Status:

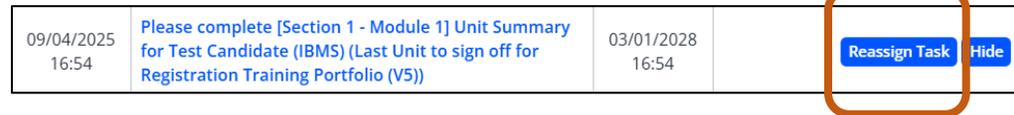
Completed tasks are always available to view by changing the status to completed.

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

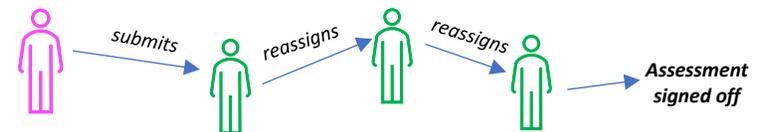
1.4.2 Reassigning tasks

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.



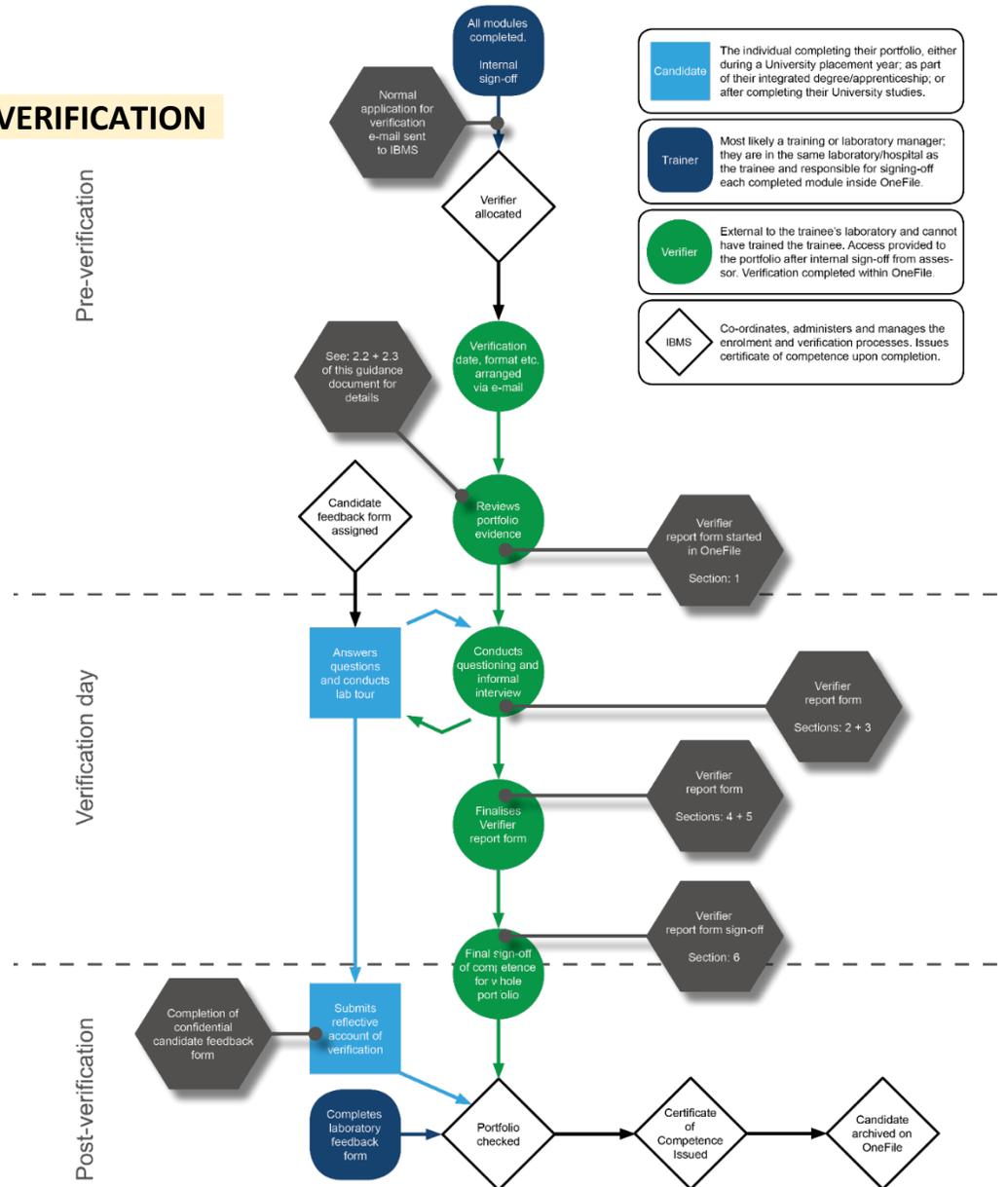
A task can be reassigned multiple times to multiple recipients until it is finally completed.

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

2 Verification

▶ REFER TO TRAINING VIDEO 7 - VERIFICATION

2.1 Overview process map



Arrow colour denotes responsibility - progress will be blocked by OneFile until the responsible person completes their action

2.2 Preparing for verification

If you have more than one profile, select your VERIFIER profile from the OneFile landing page

2.2.1 Accessing the candidate's verification record

1. From the Home page, click **Unit Sampling** in the left side menu. The unit sampling table is displayed in the dashboard.
2. Ensure that your name is highlighted in the "Select a verifier" section, then click **Submit** on the right-hand side of this box (leaving all other values unchanged). The Verifier Unit Sampling table is displayed, which lists the candidate(s) currently assigned to you for verification.

Note: If you are an additional verifier (for example if you are shadowing a verification) search via the primary verifier's name.

2.2.2 Checking for unit sign off

To access the evidence for verification, both the trainer and candidate must have signed off each unit. The sampling table will show the date that the unit was signed off.



Depending how individual laboratories use OneFile, it is possible that all units will have the same sign-off date; or that the dates will be different – both approaches are acceptable.



If some units have not been signed off (no date in the box), ask that all are signed by both the trainer and candidate.

2.3 Verifying evidence in the portfolio

To verify the portfolio verifiers sample 100% of the final versions of evidence submitted by the candidate.

As was the case with previous (non-digital) versions of the Registration portfolio, the exact layout of the evidence within the portfolio will vary depending on the local approach taken by the training laboratory. If you are unclear of the structure or location of documentation within the portfolio, we recommend contacting the relevant trainer for further guidance.

*This section of the verification guide should be read in conjunction with Section 2.4 which outlines how to complete the **Verifier Report Form (VRF)**. For ease of reference, you may wish to open the VRF in a separate browser tab while reviewing the candidate's evidence, allowing you to enter comments directly into the form as you progress through your scrutiny.*

2.3.1 Opening the module and accessing evidence

From the verifier sampling table for the candidate, start with whichever unit you prefer.

1. Click the **date that the unit was signed off** by the trainer and candidate, this will open the **unit's summary page**.
2. Scroll to the Related Assessments section of the unit summary. The references for the assessments which contain the evidence are displayed.

Note that the evidence reference numbers are currently [blue](#).

In OneFile, **MER** is the prefix automatically assigned to all mandatory evidence assessments, while **CCR** denotes candidate choice assessments.

3. Click the reference number of the first assessment you wish to verify.

The assessment opens and you see the same information as the candidate and trainer, ensuring that all parties are working from a shared view of the portfolio.

The screenshot displays two sections of the OneFile interface. The top section, titled "[Section 1 - Module 2] Equality, Diversity and Inclusion", contains a table with three columns: "Section 1 - Module 2", "Progress", and "Total". The table lists two outcomes: "[Outcome 01] Knowledge" and "[Outcome 02] Competency", both showing 100% progress with green bars. The bottom section, titled "Related Assessments", features a text input field for "VERIFIER Planned Sample Method(s)" with the value "None". Below this is a table with two columns: "Assessment Method" and "Assessment References". The table lists "Candidate Choice" with the reference "CCR3 CCR4" and "Mandatory Evidence" with the reference "MER2".

Section 1 - Module 2	Progress	Total
[Outcome 01] Knowledge	<div style="width: 100%;"></div>	100%
[Outcome 02] Competency	<div style="width: 100%;"></div>	100%

Assessment Method	Assessment References
Candidate Choice	CCR3 CCR4
Mandatory Evidence	MER2

Each assessment in a portfolio (e.g. MER3, CCR14 etc) has the following section structure:

- **Task overview** – provides details the task, instructions given to the candidate and links to relevant learning resources/support material.
- **Assessment** – confirms whether this is a piece of Mandatory Evidence, or a candidate Choice. In some circumstances “APL” may appear in this section, which stands for Accredited Prior Learning. APL is used in portfolios s being verified for HCPC registration by Equivalence.
- **Criteria** – highlights the SoPs which were pre-mapped by the IBMS to this assessment. You may notice these SoPs appear in two different shades of blue:
 - Darker blue: SoPs confirmed by the trainer as being met by the evidence
 - Paler blue: SoPs deselected by the trainer at sign-off, indicating they were not demonstrated by the evidence.
- **Evidence** – the submission that the candidate made against this task. The evidence may be typed directly into the box, or it may be a series of attached documents. The approach taken will vary from one laboratory to another, but we anticipate that the structure, layout and approach taken within each module of the same portfolio will be consistent.
- **Verifier** (invisible to candidates) – this section is only visible to verifiers (see Section 2.3.3).
- **Feedback & Comments** – this should start with the **candidate’s justification** for the submission and then proceed to show an iterative process of feedback and communication between the trainer and candidate.

The screenshot displays the assessment interface with the following sections:

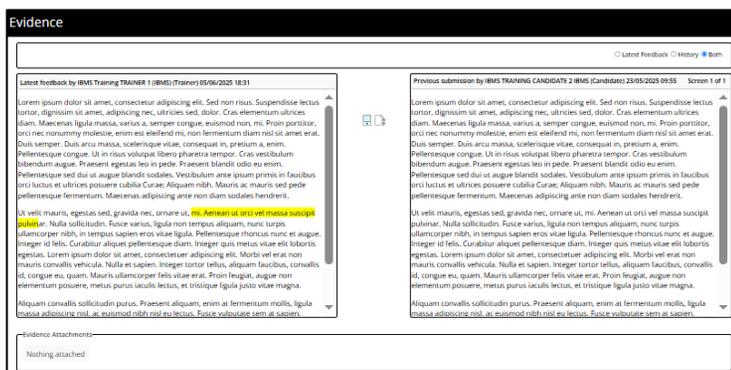
- Task Overview**: Shows assessment details including Primary Method (Candidate Choice), Reference (CCR11), Date (02/09/2024), and Title (S1 : M1 - Evidence: 2).
- Assessment**: A section for the candidate's submission.
- Criteria**: Lists Standards of Proficiency (SoPs) for [Section 1 - Module 1] Personal Responsibility and Development. It includes outcomes for Knowledge and Competency, with specific SoPs listed in different shades of blue.
- Evidence**: A section for the candidate's evidence submission.
- Feedback & Comments**: Shows a message from the trainer to the candidate on 14/05/2025, with a feedback input field and a "Nothing is attached" button.
- Verifier (invisible to Candidate)**: A section for the verifier's assessment decision and judgements. It includes radio buttons for "Accept" and "Resubmit - Send back to Trainer", and checkboxes for "Safe", "Fair", "Valid", and "Reliable".
- Declaration & Signatures**: A section for the candidate's declaration and signatures, with a table for Declaration, Name, Signed on Completion, and Date.

2.3.2 Verifying the evidence

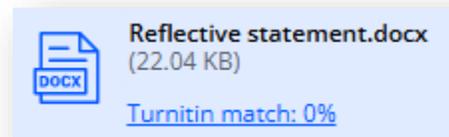
Scroll to the **Evidence** section of the assessment.

The evidence may have been imported directly into the evidence window and /or attached as one or more files.

Direct-digital evidence – If the candidate entered their evidence and feedback directly into the evidence field, you can toggle between the final and previous versions using the buttons on the right-hand side of the submission screen.



Attached files – If the evidence was uploaded as documents (e.g. PDF, Word), you may need to download and open the files in their native applications (such as Microsoft Word or Adobe Acrobat). OneFile also supports multimedia formats, so candidates may include images, audio, or video files as part of their evidence. If the file was submitted to plagiarism checked, Turnitin, you can click to view the similarity report.



2.3.3 Scrutinising SoPs

Once you have reviewed the evidence submitted by the candidate and considered the feedback comments or any other information provided by the trainer, you must decide whether you accept the submission and agree that the relevant SoPs have been addressed.

	<p>Mandatory evidence (MER): the pre-mapped SoPs are the minimum required for that evidence. SoPs can be added to MERs but not removed.</p> <p>For candidate choice (CCR): the pre-mapped SoPs can be demonstrated by either piece of evidence.</p>
--	---

If there are points that you wish to raise with the candidate/Trainer during the verification, make a separate note of these, or include them in the draft Verifier Report Form (see Section 2.4). The Verifier Report Form must include comments about the evidence submitted for each unit.

1. Scroll to the Criteria section of the assessment. Depending on which option is most appropriate, the step(s) you take next will vary:

OPTION A:	OPTION B:	OPTION C:
The evidence meets ALL the SoPs mapped by the trainer	The evidence meets the majority (but not all) of the mapped SoPs	Insufficient SoPs have been met; additional evidence required

2.3.3.1 OPTION A – All trainer-mapped SoPs met

Agreeing with the SoP mapping of the trainer is the most likely outcome.

To confirm that you agree with the assessment decision of the trainer, follow the steps below:

1. Select ‘**Sample checked**’ criteria.
2. Click **All**. The SoPs will turn **red**.
3. Scroll down to the ‘Internal verifier’ section.
4. Click the **Accept** radio button
5. Scroll to the bottom of the page and tick your signature box.
6. Click **Save & Quit** to finish your scrutiny of this piece of evidence and return to the Unit Summary.

The OneFile reference for the assessment you have just verified will turn **red**.

2.3.3.2 OPTION B – Majority of trainer-mapped SoPs met

If the evidence demonstrates some of the SoPs signed off by the trainer, you can override the trainer’s mapping of the SoPs by following the steps below:

1. Select ‘**Sample checked criteria**’.
2. Check any SoPs that you accept have been met.

The criteria you tick (to accept as met) will turn **red**

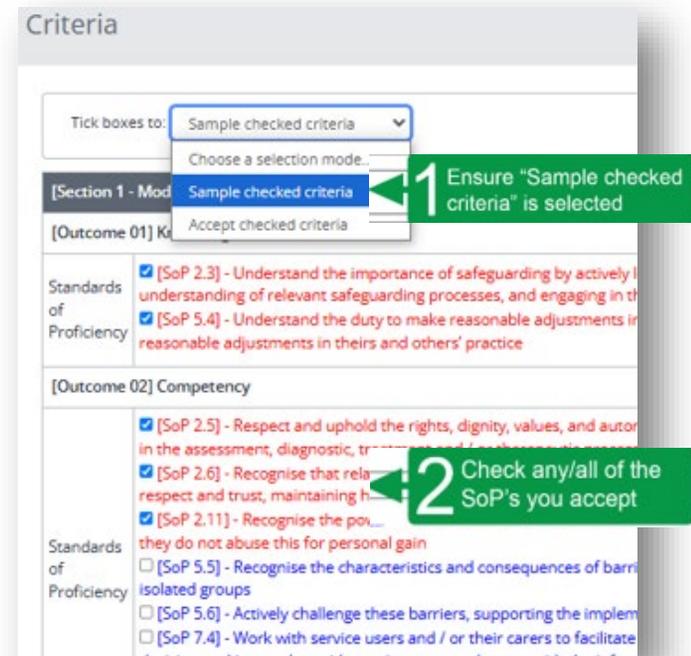
If you cannot confidently sign-off the module until the verification visit/meeting, **DO NOT click any of the buttons in the Internal verifier** (Invisible to candidates) section.

3. Scroll to the bottom of the page and click **Save & Quit**. **Do not tick the Sign checkbox.**

This will save your mapping and close this piece of evidence.

You will be returned to the Unit Summary screen.

If you have not made a decision to Approve or Resubmit, the OneFile reference for the evidence you have just been scrutinising will remain **blue**.

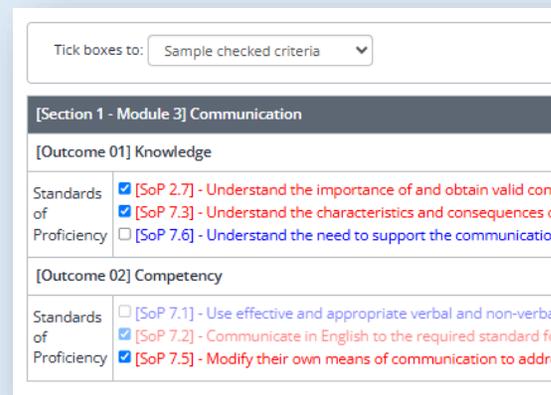


red, bold: both the trainer and verifier believe that this SoP is evidenced

blue, bold: the trainer believes the SoP is evidenced, the verifier does not

blue, not bold: both trainer and verifier believe the SoP is not evidenced

red, not bold: only the verifier believes the SoP is evidenced



Interpreting the appearance of SoPs in the assessment

2.3.3.3 OPTION C – Insufficient: Additional evidence required

If the evidence is insufficient and does not map to the SoPs, the evidence should be resubmitted back to the trainer, with comments outlining what additional evidence/work is required for the candidate to meet the required standard:

1. Select 'Sample checked criteria'.
2. Check any SoPs that you accept have been met.

The criteria you tick (to accept as met) will turn **red**

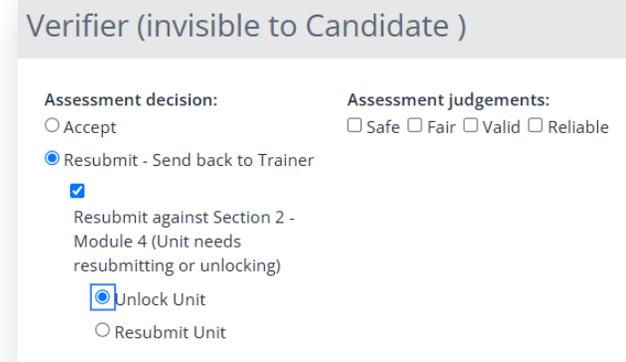
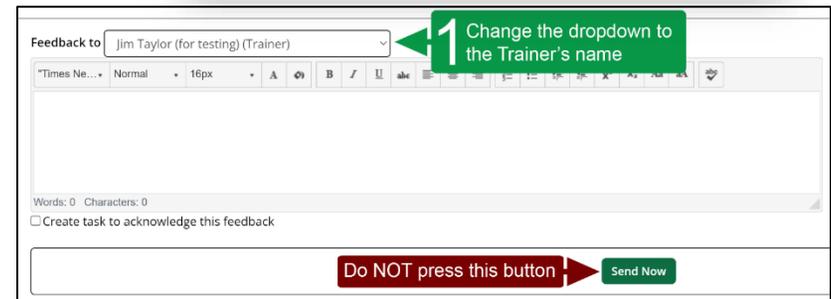
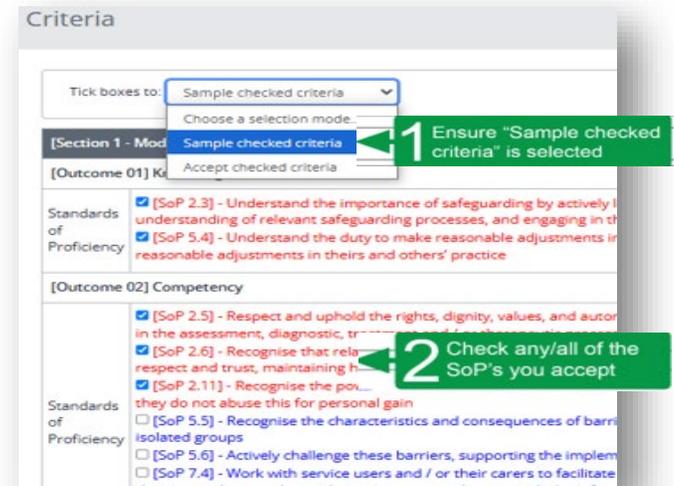
3. Scroll to the Feedback and Comments section.

OneFile will not allow you to reject a piece of evidence without providing feedback to explain this.

The feedback you provide here will be **visible** to all parties who have access to the candidate's portfolio, **including the candidate**.

4. Select the **trainer's name**.
The trainer will be required to unlock the submission before the candidate can make any adjustment(s) to the submission.
5. Scroll down to the Internal verifier section.
6. Select the **Resubmit** radio button.
7. Check the checkbox for submission against the unit (it will be the only one available)
8. Select the **Unlock Unit** radio button.
9. Scroll down to the Signature section.
10. Tick your signature box.
11. Click **Save & Quit**.

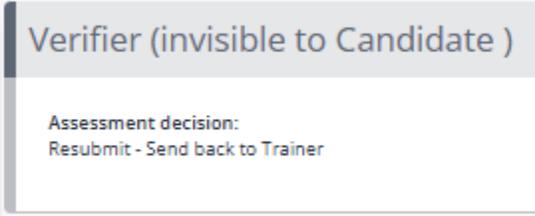
You will exit this piece of evidence and return to the Unit Summary.



The submission has now been unlocked back to the trainer that signed it so that the trainer can provide further guidance to the candidate and the submission can be altered. The decision will be visible on the assessment to the trainer as “Resubmit – Send back to trainer”.

The trainer will have received a **message** containing your feedback and a notification in their task list alerting them of the decision.

Assessment MER4 by IBMS TRAINING
CANDIDATE 2 IBMS needs resubmitting



Rejecting and unlocking a unit back to the trainer means that OneFile will not allow you to sample any further evidence in that unit until the it has been signed off by the candidate and trainer. The sign-off date for the unit sent for resubmission will be removed from the unit sampling table.

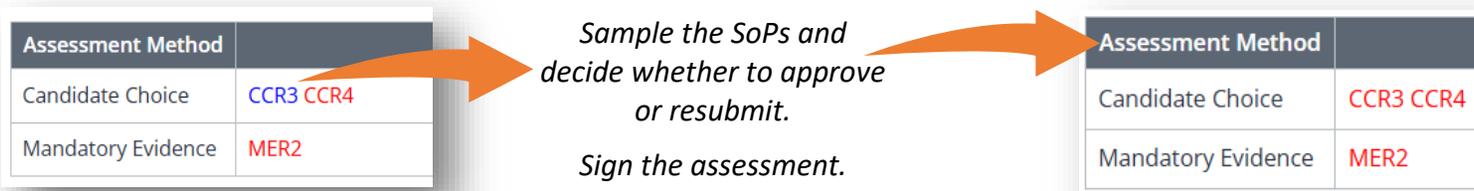
2.3.4 Resubmissions

You may decide to allow the trainer and candidate to resubmit the evidence you have requested in advance of the verification visit. Ask the trainer to contact you when they have undertaken the revisions with the candidate and signed off the assessment and associated unit. It will then appear in your sampling table with the new sign-off date and should be scrutinised as any other piece of evidence.

2.3.5 Finalising sampling and assessment decisions

At the end of this initial independent scrutiny, you may have assessments that are still blue, as you are waiting for the verification visit/meeting to assess knowledge and understanding of a particular SoP.

After the verification, navigate back to the relevant evidence to confirm the SoP is now accepted. Follow Option A to **confirm all SoPs have been addressed** and then accept the evidence as complete (see Section 2.3.3.1). If you have signed any assessment that you now wish to edit, use the **Unlock** feature to make the assessment editable (see Section 1.3)



2.4 The Verifier Report Form (VRF)

The VRF can be started at any time in advance of the verification visit. We recommend starting the form during the process of evidence verification and using the draft form as a repository for notes and potential verification questions.

The VRF is one of **three forms** created and captured digitally during the verification process.

2.4.1 Creating a new Verifier Report Form

Each verifier report form is created as a separate instance. In most cases, where verification of the candidate is successful at the first attempt, only one instance of the form will exist. When a re-verification is being performed, a new (second) instance of the form is created. The original verification form remains unaltered.

1. Click the candidate's name from the Unit Sampling table. The portfolio opens.
2. Go to the Forms tab and click **Verifier Report Form**.

We recommend right-clicking on this button and **opening the verifier report form in a new tab**, so that information can be added to the form during the verification of the portfolio evidence.

3. Click **Create new instance**. If this button is not visible, ensure that the "Form" drop-down list is NOT set to "all forms"

The "New instance" pop-up box suggests a name for the form. Accept the suggest form name.

4. Clicking **Create**.

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

VERIFIER Unit Sampling Table (1) Candidate selection: Single-mode Zoom table: -

Simple
 Planned Sample with Anticipated Completion Dates
 Actual Sample with Unit Signed Off Dates

Advanced
 Show Pending Unit Rejections
 Show Assessment Processes

Candidate Name	Started	n 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5	Section 2 - Module 1	Section 2 - Module 2	Section 2 - Module 3	Section 2 - Module 4	Section 2 - Module 5
Taylor (for testing), Jim	10/10/2024	2024	24/02/2024	24/02/2024	24/02/2024		24/02/2024	24/02/2024	24/02/2024

Assessment Methods
 APL APL CCR Candidate Choice MER Mandatory Evidence

Planning & Sampling
 [R] Pending unit selection [FP] Formative Planning [FS] Formative Sampling [SS] Summative Sampling

Centre Specific Processes

Information & Options

Learning Aims

Registration Training Portfolio (RS)	Current Progress	Target Progress
	100%	68%

Overall Progress: 100% Laboratory: Default Laboratory Candidate Status: None

Pending View pending and completed Training Plans
 Pending View pending and completed assessments
 None scheduled View candidate progress reviews Progress Reviews

Activities Manage Progress Forms

Verifier Report Form

2.4.2 Drafting the Verifier Report Form

The verifier report form has been restructured from previous versions of the Registration Training Portfolio. The new verifier report form contains six sections:

1. Scrutiny of portfolio evidence
2. Informal interview with candidate
3. Laboratory tour
4. Training environment
5. Summary feedback comments for the verification
6. Verification Outcome

home / IBMS TRAINING CANDIDATE 2 IBMS / Verifier Report Form

Introduction to the Verifier Report Form

The external verifier will complete their scrutiny of the portfolio evidence in OneFile. Scrutiny of the entire portfolio should not exceed 90 minutes, during which each piece of evidence must be sampled and signed-off by the verifier, according to the support documentation available from the IBMS.

For virtual (online) verifications:
The portfolio review and the verification laboratory tour can both be completed entirely online using OneFile and a Teams meeting with both the candidate and the verifier. In this case, we recommend scrutiny of the portfolio evidence takes place in advance of the verification meetings.

For Face-to-face verifications:
The portfolio review can be conducted via OneFile on the day of the verification visit whilst the verifier is on-site. Alternatively, the verifier may choose to scrutinise the portfolio in advance of the visit, to reduce their time on-site. Regardless of when scrutiny of the portfolio evidence takes place, the verifier will require access to a laptop connected to Wi-Fi during the face-to-face verification in order to complete this report form.

1. Scrutiny of Portfolio Evidence

Section: 1 Module: 1 - Personal Responsibility and Development

Section: 1 Module: 2 - Equality, Diversity and Inclusion

Section: 1 Module: 3 - Communication

Signatures

Name	Signed	Date
IBMS TRAINING VERIFIER_1 IBMS (Verifier)	<input type="checkbox"/>	07/06/2025 11:41
Deirdre (Trainer_4 IBMS) McLaughlin (Trainer_4 IBMS) (Trainer)		

Save Delete Cancel

The verifier report form can be started at any time in advance of the actual verification meeting/visit and saved for final sign-off at a later date. Draft forms are shown with the suffix “(Pending)” in the candidate’s portfolio.

Points to note for completion:

- Feedback on each unit must be provided
- The process of conducting the review of the portfolio evidence and the verification is the same, regardless of whether the verification is conducted virtually or in-person.
- All users (trainers, observers etc.) associated with this candidate can see the completed form.
- Check boxes are confirmatory. i.e. placing a check in a box confirms you agree with the statement. If you cannot tick to confirm the statement, this **DOES NOT** automatically mean that the candidate fails the verification.
- If you cannot confirm the statement associated with a check box, please provide context to explain why in the relevant “additional information” section.
- To keep working on a draft copy of the form click **Save**.
Do not tick the signed box.
- Only tick the signed box and save when the form is completed (see Section 2.5.2). Once saved it cannot be deleted.

Pass/fail decisions of the candidate at verification are at the sole discretion of the verifier.

2.5 The verification visit/meeting

During the verification meeting, the candidate and the verifier both need access to the portfolio on OneFile. The verifier should have the draft Verifier Report Form open in OneFile to use the notes they made during their scrutiny of the evidence.

2.5.1 Opening the partially-completed VRF

1. From the Unit Sampling table, click the candidate's name to open their portfolio.

The form can be found in the **Forms** tab in the candidate's portfolio.

We recommend **right-clicking on** this button and opening the verifier report form in a **new tab**, so that information can be added to the form during the verification of the portfolio evidence.

If you have started the verifier report form during your scrutiny of the evidence, the verifier report form label will include the suffix “(pending)”.

2. Open the existing instance of the form by clicking **Open** to the right of the form entry in the table.

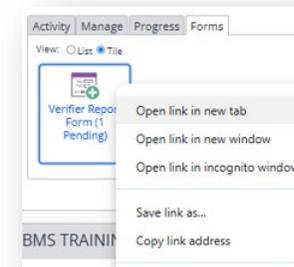
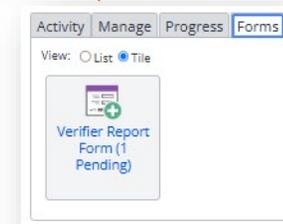
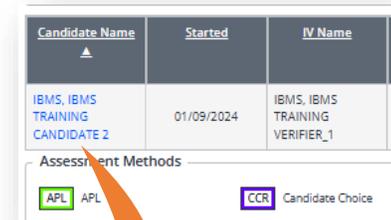
If this is a re-verification following a previously unsuccessful outcome, you will be able to open the previous instance of the form and review the comments left during that verification. However, previous versions of the form are NOT editable once signed off.

2.5.2 Finalising and signing the VRF

Conduct the verification visit/meeting drawing your questions from the comments you have provided against each unit in Section 1 of the Verifier Report Form.

NB: For SoPs you were unable to verify during your independent scrutiny of the digital evidence in the portfolio, please include comments in the Verifier Report Form to show that you have satisfied yourself that the SoP has been addressed during the verification itself.

After the verification, navigate back to the relevant evidence to confirm the SoP is now accepted. Follow Option A to **confirm all SoPs have been addressed** and then accept the evidence as complete (see Section 2.3.3.1). If you have signed any assessment that you now wish to edit, use the **Unlock** feature to make the assessment editable (see Section 1.3)



Form Name	Candidate Name	Instance Name	Date Created	Date Modified	Signatures	Actions
Verifier Report Form	IBMS TRAINING CANDIDATE 2 IBMS	IBMS TRAINING VERIFIER_1 IBMS - Verifier Report Form - 06/06/2025	06/06/2025 09:32:55	06/06/2025 09:32:55		

Specifically:

1. You should confirm the statements in Sections 2–5 of the VRF.

Please provide as much detail as practicable in terms of the content and discussion that takes place during the verification.

Check boxes are confirmatory. i.e. placing a check in a box confirms you agree with the statement.

If you cannot tick to confirm the statement, this **DOES NOT** automatically mean that the candidate fails the verification but please provide feedback to explain why you cannot confirm any specific point.

2. It is only necessary to provide feedback in Section 6 of the Verifier Report Form if you **CANNOT** recommend the award of the Certificate of Competence, or ongoing training approval of the laboratory.

Pass/fail decisions of the candidate at verification are at the sole discretion of the verifier’s professional judgement.

3. When you have completed the VRF, **tick the signed box** to confirm your decision and then click **Save**. **This will make the form un-editable.**

The page will refresh, showing that your comments have been locked into the form.

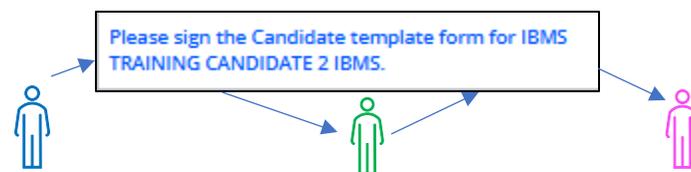
4. Click **Cancel** to exit.

Form Name	Candidate Name	Instance Name	Date Created	Date Modified	Signatures	Options
Verifier Report Form	IBMS TRAINING CANDIDATE 2 IBMS	IBMS TRAINING VERIFIER_1 IBMS - Verifier Report Form - 06/06/2025	06/06/2025 09:32:55	07/06/2025 07:53:42	✓ ■ ■	Open

2.6 After the verification visit

Once the verifier has signed the VRF, a task is sent to the **default trainer** and candidate (each in turn) for them to view and accept that the process has been completed as described in the report.

Each of the signature boxes associated with the report form will turn green as each person signs the form.



Form Name	Candidate Name	Instance Name	Date Created	Date Modified	Signatures	Options
Verifier Report Form	IBMS TRAINING CANDIDATE 2 IBMS	IBMS TRAINING VERIFIER_1 IBMS - Verifier Report Form - 06/06/2025	06/06/2025 09:32:55	07/06/2025 08:06:13	✓ ✓ ✓	Open

The verifier will receive a task from the trainer asking them to review and sign the Laboratory Feedback Form that the trainer has created.

Any SoPs which were not met by the initial evidence but were covered satisfactorily during the verification should be updated and signed off in their relevant unit (see Section 2.3.3).



If you have signed any assessment that you now wish to edit, use the **Unlock** feature to make the assessment editable (see Section 1.3)

The verification outcome (Pass/Fail) determines what action now needs to be taken by the verifier.

2.7 Verification outcomes

2.7.1 If the verification is successful

1. Select **Unit Sampling** from the left side menu.

The unit sampling table is displayed.

2. Choose your name in the Select a verifier dropdown.
Leave all other values unchanged.

3. Click **Submit**

The Verifier Unit Sampling table is displayed. This lists the candidate(s) currently assigned to you for verification.

Note: If you are an additional verifier (for example if you are shadowing a verification) search via the primary verifier's name.

4. Check that each unit shows:

One box, labelled MER

Two boxes labelled CCR

This arrangement confirms that the Mandatory evidence (MER) and candidate choice evidence (CCR) for the module have been **sampled**, and the SoPs **accepted**.

VERIFIER Unit Sampling Table (1)		Candidate selection:						
Candidate Name ▲	Started	Section 1 - Module 1	Section 1 - Module 2	Section 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5	Section 2 - Module 1	Section 2 - Module 2
IBMS Test candidate	24/06/2024	04/11/2024 Unplanned Sampled MER CCR CCR [SS]	04/11/2024 Unplanned Sampled MER CCR CCR [SS]	22/11/2024 Unplanned Sampled MER CCR CCR [SS]	03/10/2024 Unplanned Sampled MER CCR CCR [SS]	22/11/2024 Unplanned Sampled CCR MER CCR [SS]	30/09/2024 Unplanned Sampled MER CCR CCR [SS]	13/11/2024 Unplanned Sampled MER CCR CCR [SS]

If necessary, click into the relevant module to sign-off the outstanding SoPs as described in previous sections, to ensure that each module shows all three pieces of evidence have been verified and the related SoPs met (either in the evidence or during the verification visit/meeting).

5. Once all SoPs have been sampled and accepted, you will receive a task in your Task list asking you to sign-off the completed portfolio for the specific candidate.
6. Click into the task; at the top of the screen is another representation of the progress against each module (not shown on screenshot below). Scroll to the bottom of the screen, add any final feedback you wish to provide (this feedback is optional).

Summative Comments & Declarations (visible to managers and verifiers only)

Internal Verifier Summative Comments

[Empty text box]

External Verifier Summative Comments

No comments provided

I confirm that the above learning aims has been completed and...

Name	Signed	Date
Jin Taku (St. Paul's); receive feedback	<input type="checkbox"/>	29/02/2024 15:57:09
Prattavirshi	<input type="checkbox"/>	

Save

7. **Tick in the signed box** to confirm that the portfolio is complete and that you recommend award of the Certificate of Competence. Then, click **Save**.

The portfolio has now been marked as completed. This will convert everything to 'read only' access in the portfolio. All forms will remain 'live'.

2.7.2 If the verification is not successful

If, on the day of verification, it is not possible to recommend the award of Certificate of Competence:

- Provide feedback in Section 6 of the VRF to outline the reason(s) why you are unable to successfully verify the candidate. Feedback should be objective and evidence based.
- Discuss the reason why you are currently unable to pass the portfolio and recommend the award of Certificate of Competence with the trainer and candidate.
- If appropriate, an agreement should be reached on the work required to meet the necessary standard.
- If it is deemed appropriate to simply ask for additional evidence (with or without another verification/partial verification), the verifier should reject the units(s) in question and ask the trainer to resubmit the tasks back to the candidate for the additional work to be done (see Section 2.3.3.3).

Once the additional work has been completed by the candidate:

1. The trainer should sign off the assessments and unit summaries and contact the verifier to confirm when this has been done.
2. The verifier should re-sample the evidence, to determine whether it meets the required criteria.
 - **If it is NOT necessary to hold another verification meeting:** the evidence should be accepted, and the portfolio can now be signed off as a successful verification.
 - **If a re-verification meeting is required:** the re-verification should be arranged and the normal process for verification conducted. A new instance of the Verifier Report Form should be initiated, but it is only necessary to include information concerning the changes/improvements since the previous verification.

Unsuccessful verifications can be difficult to address.

Please contact the IBMS Education team if you need further advice or guidance on how to address this situation:
registration@ibms.org

3 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 unit, 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.