



**Laboratory Training  
Approval Guidance for  
the Application  
Process**

*Version 1*

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## 1. Introduction

The IBMS is an education provider for several routes to registration with the Health and Care Professions Council (HCPC) which must comply with the HCPC Standards of education and training (SETs) for pre-registration training and completion of the IBMS Registration Training Portfolio for the award of the IBMS Certificate of Competence.

The questions asked in the declaration form and the information provided as part of the training programme allows us to assure the HCPC that anyone training on our behalf fulfils the requirements of the SETs. The information you provide allows us to build a picture of the training environment.

In laboratories undertaking pre-registration training, a senior member of staff (usually laboratory manager) must ensure that potential registrants are able to meet the HCPC requirements for registration with regard to health and Criminal Conviction/ Disclosure and Barring Service checks. Checks must be carried out on each trainee and a declaration must be made by them at the point of application for the registration portfolio. If this check raises an issue which may affect a trainee's eligibility to become registered the senior member of staff should formally discuss this with the trainee, document the discussion and guide the trainee to seek advice from the HCPC at that point. A portfolio will not be released unless the IBMS receive a declaration to say that this process has been followed.

A declaration from the trainee will be required at the end point, following verification, which states that there have been no changes to their health or DBS check during the training period and that they do not know of any reason which might affect their eligibility to apply to become registered.

***It is the responsibility of the individual laboratory to communicate any changes in training or of staff to the IBMS by emailing [educationsupport@ibms.org](mailto:educationsupport@ibms.org)***

## Key Staff Involved in Training

Each laboratory is expected to have a core set of staff with responsibility to oversee the completion of IBMS portfolio qualifications.

In line with communication of best practice, the IBMS strongly recommends at least one external verifier for IBMS registration portfolios and one external examiner for specialist portfolios in each laboratory. This could be an experienced training officer or other equally experienced senior member of staff that meets the IBMS criteria for external verifiers/examiners. The benefits of this are that elements of good practice are shared across laboratories and internal processes are informed by experience of processes used externally.

Where appropriate, for post registration training, there should be a named person with the necessary discipline-specific knowledge and skill to support that qualification.

A typical laboratory will have the following staff responsible for training:

- Laboratory manager
- Training manager/coordinator (usually at a pathology-wide level)
- Training officer (expected to have discipline-specific knowledge and skills)

IBMS laboratory training approval is required to undertake IBMS laboratory-based portfolio qualifications. Each department must possess current laboratory training approval in order to host training with the qualification which they are applying.

There are three (3) levels of training approval available for the three levels of portfolio qualifications. Each qualification requires training approval of the training programme put in place by the applying department.

Three categories of training approval:

**1. Support Staff Training Approval**

This category refers to the training of laboratory support staff through to the award of the IBMS Certificate of Achievement Parts I and II.

**2. Pre-Registration Training Approval**

This category refers to the training of those seeking registration as a biomedical scientist with the Health and Care Professions Council through the IBMS Registration Training Portfolio, leading to the award of the IBMS Certificate of Competence.

**3. Post-Registration Training Approval**

This category refers to the training of qualified biomedical scientists in specialist areas of practice through to the award of the IBMS Specialist Diploma.

The Institute maintains an up-to-date database of approved laboratories at a departmental level, including key training staff within each department. This list of key staff is expected to match any named staff on any portfolio application

**This document gives guidance on achieving laboratory training approval and can be used alongside the Clinical Laboratory Standards for IBMS Qualifications document**

## 2. Laboratory Training Approval

When applying for laboratory training approval for a department you will be required to provide documentation such as the Declaration form and further supporting documents depending on the whether you are applying training approval for the first time, renewing current or expired training approval with a depending on or applying for further levels of approval and disciplines to extend the qualifications which can be trained within that department.

Training approval is granted for a **five-year** period and will not automatically renewed. The onus is on the approved laboratory to submit the required application and documentation for renewal of approval at least **six months** prior to the expected expiration date of current approval.

**The application form should be completed and submitted for each application process.**

### 2.1. First-time Approval Process

- a. Completed Declaration form (Application).
- b. Completed Training Programme for each level of training approval and discipline applying.
- c. Training Laboratory Documentation:
  - I. Induction Policy
  - II. Training policy (Examples of Training Policy documentation for each level of training approval can be seen in [Appendix One.](#))
  - III. Health and Safety
  - IV. Equality and Diversity

### 2.2. Renewing Training Approval

- a. Completed Declaration form (Application).

**Note:** The training laboratory documentation and Training Programme will be required if changes have been made to the training process and documentation following the initial application for first-time approval.

### 2.3. Applying for Additional Levels of Approval and Disciplines

- a. Completed Declaration form (Application).
- b. Completed Training Programme for each additional level of training approval and discipline applying.

**Note:** The training laboratory documentation: The training policy and induction **only** will be required if the initial documentation submitted for first-time approval does not include the additional level of training approval being applied for. (e.g., If your initial application and supporting documentation includes Support Staff and Pre-registration approval only, further documentation should be provided to support this).

### 3. Applying for Additional Levels of Approval and Disciplines

The Training Approval Declaration Form is the application form for training laboratory approval. This form will be required for first-time approval, renewal of approval and additional approval request.



**INSTITUTE OF BIOMEDICAL SCIENCE**

**Application for Laboratory Training Approval to deliver IBMS Qualifications**

This form should be completed for each department and sent to [registration@ibms.org](mailto:registration@ibms.org)

**Note:** Departments applying for first time training approval will be required to provide the training policy documentation and training programme alongside this application. *(Please refer to Clinical Laboratory Standards for IBMS qualifications and guidance for training laboratory Management and approval page 23 appendix two - Expectations of the training programmes)*

Any sections which indicate standards are not met will be followed up by the IBMS as part of the application process. Further information on the standards can be found here:  
<https://www.ibms.org/resources/documents/ibms-laboratory-training-approval>

Tick the relevant boxes to indicate which level of IBMS qualifications you are seeking training approval status for. (NB: Multiple boxes may be ticked):

Support Staff Training Approval (For Certificate of Achievement Part I & II)	<input type="checkbox"/>
Pre-Registration Training Approval (For the Registration Training Portfolio)	<input type="checkbox"/>
Post-Registration Training Approval (For the Specialist Diploma)	<input type="checkbox"/>

Please indicate which of the following have previously been approved for training by the IBMS and the date of expiry:

Support Staff Training Approval (For Certificate of Achievement Part I & II)	<input type="checkbox"/>	
Pre-Registration Training Approval (For the Registration Training Portfolio)	<input type="checkbox"/>	
Post-Registration Training Approval (For the Specialist Diploma)	<input type="checkbox"/>	

The Declaration form require you to identify the levels of training approval being applied for and for those applying for renewal to identify the levels of training approval that department currently holds and the expected expiry date. The form also consists of four sections to be completed as required prior to submission.

## Section 1. Organisation/Department Details:

This section should include the name of Department, Trust, Hospital, and address of site for laboratory training approval.

**Note:** If applying for multiple sites additional tables can be added to outline the required details for each site. Further tables can be included to list each site details and staff for each site involved in the training.

### Example:

#### Section One - Organisation/Department Details:

Example department: Microbiology, Haematology etc.

If one department is on multiple sites, please give details below. (Additional tables may need to be created)

Department:	Virology		
Organisation/Trust Name:	Health Nations Hospitals trust		
Hospital Name:	Health Plus Hospital		
Hospital Address:	12 Cold bath Square		
	London	Postcode:	EC1R 5HL

Department:	Virology		
Organisation/Trust Name:	Health Nations Hospitals trust		
Hospital Name:	Plus, Medical Hospital		
Hospital Address:	Cold Water Circle East		
	London	Postcode:	HC1R 9H

Within this section the discipline/s for **Post Registration** training approval can be identified within the provided table of Specialist Portfolio disciplines. This must be completed to confirm further approval for renewing post registration disciplines which held training approval as well as identify additional disciplines requiring training approval.

Please indicate all disciplines covered by this department.

Cellular Pathology	<input type="checkbox"/>	Clinical Biochemistry	<input type="checkbox"/>
Clinical Immunology	<input type="checkbox"/>	Cytopathology	<input type="checkbox"/>
Cervical Cytology	<input type="checkbox"/>	Diagnostic Cytopathology	<input type="checkbox"/>
Haematology	<input type="checkbox"/>	Histocompatibility & Immunogenetics	<input type="checkbox"/>
Transfusion Science	<input type="checkbox"/>	Medical Microbiology	<input type="checkbox"/>
Genetics/Molecular	<input type="checkbox"/>	Virology	<input type="checkbox"/>

The United Kingdom Accreditation Service (**UKAS**) and other regulatory body accreditation should be identified along with the accreditation period. (Note: UKAS accreditation is not a requirement for IBMS laboratory training approval).

### Placement Students

Laboratories applying for training approval for Pre-registration level of approval to deliver training for the IBMS Registration Training Portfolio are to confirm whether laboratory-based placements are offered to university students.

The name of the University(s) and length of placement should be given. Further confirmation should also be provided within the appropriate table confirming the required checks are made with the respective university prior to the commencement of the placement.

### Section 2. Training Staff Details:

Details of training staff involved in the delivery of training for the IBMS qualification should be provided. This information will be logged against the department applying for approval records.

This should include details for the following included in training:

- Laboratory Manager
- Training Manager/Co-ordinator
- Training Officer

**Note:** Additional tables can be created to identify further training staff members.

### Section 3. Declaration of Compliance:

Confirmation of training policies available and location which they may be found within the laboratory should be identified.

<b><u>Section Three – Declaration of compliance:</u></b>			
I can confirm that the following policies are in place and accessible to all staff:			
Policy	Location	Confirmation	
		Y	N
Induction Policy (Organisation wide)		<input type="checkbox"/>	<input type="checkbox"/>
Induction Policy (local)		<input type="checkbox"/>	<input type="checkbox"/>
Equality and Diversity		<input type="checkbox"/>	<input type="checkbox"/>
Health and Safety		<input type="checkbox"/>	<input type="checkbox"/>
Training Policy		<input type="checkbox"/>	<input type="checkbox"/>

Further confirmation for requirements should be identified confirming they have been met. Some shortfalls in completing this area of the applications form preventing training approval are as follows:

There are regular monitoring and evaluation systems for training in place (**indicate how often**) (Std 2.6) .....

There is a named person who has overall professional responsibility for the training process (**give name and HCPC number**) (Std 2.3)

**Name:**

**HCPC number:**

### Key Areas

The Key Areas section is required to confirm the outlined information can be found within the training policy for the department applying for training approval.

**Note:** This table contains information often left out of the policy documentation but required for training approval.

### Training Programme

This table will allow you to identify the information provided within the training programme for first-time applications and serve as a confirmation of what can be seen from the current training programme used within in the department applying for renewal of training approval.

**Note:** A training programme template to support this will be required for first-time training approval, further training approval for another discipline or level of approval. A training programme will also be required if there are changes made to update the current information registered on the system for that department.

### Section 4. Final Declaration:

The final declaration should be completed, dated and signed by the individual responsible for overall training within that department. In completing the declaration, you are confirming that the information provided in the on the application form and supporting document are correct and reflect the training laboratory practice and training.

You can access the application form for completion by accessing the [Training Approval webpage](#).

## 4. Training Programme

The Training Programme will be required for first-time training approval, additional approval for disciplines and levels of training approval and for renewals where changes have been made to the training programme applying for first-time training approval.

The Training Programme provided should be specific to the IBMS qualification and level of training approval you are applying for. The training programme should also be clearly structured and demonstrate how the candidate will complete the portfolio within that department (and secondment sites identified).

**Note:** A training programme template can be downloaded from the Institute website ( [Training Approval webpage](#) ) and populated to demonstrate the training programme carried out by new trainees for the level of qualifications. This template is optional and original training programme can be submitted once the required information is provided as it relates to the training hosted by the applying department.

- Laboratory sections, departments, and secondment sites/off-site arrangements
- Assessment methods (details of assessments and methods which standard will be met for each module) e.g., Observation, question and answers, reflective statement etc.
- Relevant Competences
- Durations of overall training period and duration on secondment/off-site
- Support provided to trainee by training staff

	A	B	C	D	E
1	<b>Certificate of Competence (Registration Training Portfolio)</b>				
2	<b>Portfolio Standard/Module</b>	<b>Laboratory Section</b>	<b>Assessment Methods</b>	<b>Any Relevant Competencies</b>	<b>Notes</b>
3	<b>Section 1: Professional Conduct</b>				
	<b>Module 1</b>				
4	Personal Responsibility and Development				
	<b>Knowledge standards</b>				
5	Registered biomedical scientists must:				
6	1. Know the limits of their practice and when to seek advice or refer to another professional (HCPC SoP 1.1)				
7	2. Recognise the need to manage their own workload and resources effectively and be able to practise accordingly (HCPC SoP 1.2)				
8	3. Understand the need to act in the best interests of service users at all times (HCPC SoP 2.1)				
9	4. Understand what is required of them by the Health and Care Professions Council (HCPC SoP 2.2)				
	5. Understand the need to respect and uphold the rights, dignity, values and autonomy of service users including their				

*Additional columns can be added to the training programme template as required to provide details of a robust training programme. See [Appendix Two](#) for examples of training programme and details.*

## 5. Training Documentation

The Training documentation should include the following documentation.

### 5.1 Training Policy (see [Appendix One](#))

The training policy is a key document that serves as an index to the laboratory training scheme and associated documentation. It should describe the training management strategy of the laboratory.

This document can be pathology-wide or department/discipline-specific.

It should provide information relevant to training of all staff grades and their opportunities for development.

The training policy must provide information on the following areas:

- overview of education and training within the department
- training opportunities available to all staff grades
- in-house competence assessment programme
- training support roles (e.g. training officer, training manager, coordinator, mentor)
- information on relevant professional bodies (i.e. IBMS)
- information on relevant regulatory/registration bodies (i.e. HCPC/Science Council)
- information on Certificate of Achievement (required for support staff training approval)
- information on Certificate of Competence (required for pre-registration training approval)
- information on Specialist Diplomas (required for post-registration training approval)
- placement arrangements (where appropriate)
- secondments/off-site training arrangements (where appropriate)

### 5.2 Induction and Health and Safety Documentation

When renewing, this documentation does not need to be submitted unless changes have been made that will impact the delivery of training. A declaration made to confirm that such documentation is in existence and includes the information below. It can be organisation-wide and/or department-specific but should cover the following:

- Induction procedures must clearly document that staff are informed of potential risks and safety issues.
- There must be a named health and safety officer and identified arrangements
- relevant organisation and departmental policies accessible to staff
- identify facilities available to all staff

## 6. Laboratory Approval Update Request Form

Laboratories with current training approval are expected to update the IBMS of any changes to the training programme, training staff and policies for that department.

A Laboratory Approval Update Request Form will be required for the following changes made within a department with IBMS training approval.

- Change in department title or trust
- Change in staff (details for each new staff member should be provided along with their role title). The current contacts will be updated with the details provided on the update form.



### Laboratory Approval Update Request Form

The IBMS needs to ensure it maintains an accurate database of laboratories approved for training, including all associated training staff.

Please complete this form for each department.

Any training staff currently listed against the department, but not included on this form will be removed.

Please send the completed form to [registration@ibms.org](mailto:registration@ibms.org)

**Section One - Organisation/Department Details:**

This section must be completed

Example department: Microbiology, haematology etc.

If one department is on multiple sites, please detail below. (Additional tables may need to be created).

Department	<input type="text"/>
Organisation/Trust Name	<input type="text"/>
Hospital Name	<input type="text"/>
Hospital Address	<input type="text"/>

**Section Two - Laboratory Manager Details:**

Please complete if you wish to update the laboratory manager details. If no changes are required, please leave blank.

(Additional tables may be created if you have more than one manager for the department)

A declaration section is included and required for processing. This should be completed by the main staff member responsible for overall training.

**Section Five - Declaration:**

This section must be completed

I confirm the details provided within this document are accurate.	
Signed: <input type="text"/>	Print Name: <input type="text"/>
Job Title: <input type="text"/>	Date: <input type="text"/>

In providing IBMS with the information requested you are consenting to its use as indicated in the IBMS Privacy Notice. Further information can be found on the IBMS website at <https://www.ibms.org/privacy/>

**Note:** Additional tables can be created to provide details of all training staff.

## 7. APPENDIX ONE – Example training policy

*Please note: these examples can be used, adapted, and incorporated into in-house documents.*

### EXAMPLE EDUCATION AND TRAINING POLICY

#### **NAME OF ORGANISATION**

#### **Introduction**

In conjunction with the organisation education and training policy (*link could be added here*), the Department is committed to providing training which ensures all staff have the appropriate skills and knowledge to provide a high-quality pathology service. The training policy covers all staff in the department, including scientific and medical staff, support, administration, and clerical. Policy and specific requirements are detailed below.

#### **Key Staff**

The clinical director and general manager have overall responsibility for education and training within the department. Their role is to ensure adherence to the education and training policy and ensure that departments have the necessary resources to fulfil identified education and training requirements.

#### **Laboratory Manager**

Each laboratory manager is responsible for the education and training within their department, to ensure adherence to the education and training policy, and that staff have the necessary resources to achieve identified education and training.

#### **Pathology Training Manager**

The training manager has overall responsibility across all departments for the oversight, planning and training needs of all non-medical staff, from support staff to senior scientists. Discipline-specific knowledge and skills are not required for this role, but a broad understanding is necessary.

They undertake the following:

- in collaboration with other members of staff (including the overall management team), develop an overall training policy and accompanying departmental training manuals
- provide support for and guidance to all staff members regarding training
- oversee implementation, development, and coordination of training processes within pathology
- ensure adherence to relevant professional standards and guidelines
- oversee any clinical placement arrangements
- be aware of any potential legislation that could impact on the training management system
- ensure all staff are aware of the various education and training opportunities available to support and develop their role
- provide guidance and support for continuing professional development (CPD) programmes
- ensure each department holds appropriate IBMS training approval, to allow staff to undertake IBMS qualifications as required
- ensure support is provided for individuals undertaking approved research projects.

## **Department Training Officer**

Each department within pathology will have a named training officer, who will oversee training within the department.

They will undertake the following:

- support the training manager in the development of the training policy and training manuals
- implement the departmental training policy
- be responsible for training at a local level
- work with staff members, training manager and laboratory manager to identify and implement a training plan
- provide support and guidance for staff members undertaking an IBMS qualification:
  - construct training plans
  - undertake regular training and progress reviews
  - perform assessments and review evidence required, relevant to the IBMS qualification
- ensure all staff undertake in-house competences and identify any training needs as an outcome of competence assessment
- organise and implement any training requirements for any staff in the department
- if appropriate, provide support and guidance for any university placement students
- liaise with the laboratory and training manager to review a staff member's progress and development.

## **Professional Body**

The Institute of Biomedical Science (IBMS) is the professional body for individuals working in biomedical science.

The aims are to promote and develop the role of biomedical science within healthcare to deliver the best possible service for patient care and safety. It does this by supporting biomedical scientists in their education and training, improving standards of practice, representing the profession, and working with organisations to improve laboratory service.

The IBMS provides multiple relevant qualifications for all staff grades, designed to support individuals throughout their careers. In order to undertake the majority of these qualifications, you need to be a member (grade dependent on qualification) and work in a laboratory approved by the IBMS for training.

The department currently holds all three categories of training approval (certificates are displayed on training boards) and is committed to maintaining training approval.

The IBMS also provides a CPD scheme to allow its members to record CPD activities.

## **Regulation and Statutory Registration**

Biomedical scientists and clinical scientists are required by law to hold current registration with the Health and Care Professions Council (HCPC).

The HCPC is the regulator for a number of health and care professions, including biomedical scientists and clinical scientists. The aim of the HCPC is to protect patient safety.

The HCPC has a range of standards that cover areas including training, conduct, performance, and ethics, CPD and proficiency. These standards are used to determine whether you are fit to practise as a biomedical scientist in the UK.

In order to join the register, an individual must hold the correct academic qualification for their profession and successfully undertake a period of laboratory training.

In order to maintain registration, registrants must demonstrate continued adherence to the HCPC standards of proficiency and demonstrate appropriate CPD according to the HCPC CPD standards.

For further information, please refer to the following websites:

HCPC: [www.hcpc-uk.org.uk/aboutregistration](http://www.hcpc-uk.org.uk/aboutregistration)

IBMS: <https://www.ibms.org/registration/hcpc-registration>

### **Voluntary Registration**

The IBMS is licensed by the Science Council to hold three voluntary registers which confer three professional designations:

- Registered Science technician (RSciTech)
- Registered Scientist (RSci)
- Chartered Scientist (CSci)

These registers are available to IBMS members and, in order to be eligible, individuals must fulfil set criteria based on levels of qualifications and professional practice.

For further information, refer to the following websites:

**IBMS:** <https://www.ibms.org/registration/science-council-professional-registers>

**Science Council:** [www.sciencecouncil.org](http://www.sciencecouncil.org)

### **Biomedical Support Staff**

There are various qualifications available to biomedical support staff:

- IBMS Certificate of Achievement Part I
- IBMS Certificate of Achievement Part II
- S/NVQs
- Foundation degrees
- Apprenticeship route
- HNC
- HND

If a member of staff wishes to undertake any of the above qualifications, they must approach their laboratory manager.

### **Pre-Registration Training for Biomedical Scientists**

In order to achieve registration with the HCPC as a biomedical scientist, an individual must meet the HCPC standards of proficiency. These can be met through an HCPC-approved or IBMS-accredited degree, and completion of the IBMS Registration Portfolio.

The IBMS will assess non-accredited degrees and highlight any supplementary education required.

The IBMS Registration Portfolio can be completed either as part of an approved/accredited degree, while on placement in a laboratory, or following graduation.

There is a structured training programme in place for any member of staff who wishes to undertake this portfolio, subject to agreement by the relevant laboratory manager.

Successful completion of the IBMS Registration Portfolio, in conjunction with the correct academic qualification, will result in the award of the IBMS Certificate of Competence, which indicates eligibility to apply to the HCPC for registration as a biomedical scientist.

Further information on the IBMS Certificate of Competence can be found on the IBMS website: <https://www.ibms.org/education/registration-portfolio/>

### **Post-Registration Training**

There are various post-registration qualifications available, ranging from academic courses (e.g., MSc) to professional qualifications (e.g., IBMS Specialist Diploma).

The Institute offers a range of higher-level qualifications which support biomedical scientists throughout their careers (e.g., Higher Specialist Diploma, Certificate of Expert Practice etc).

### **IBMS Specialist Diploma**

This qualification allows an individual to demonstrate specialist knowledge and skills required for *Agenda for Change* (AfC) Band 6 (or equivalent) roles.

There is a structured training programme in place for any member of staff who wishes to undertake this portfolio, subject to agreement by the relevant laboratory manager.

Further information on the IBMS Specialist Diploma, and other Institute qualifications can be found on the IBMS website <https://www.ibms.org/education>

### **Statutory and Mandatory Training**

Statutory and mandatory health and safety (H&S) and governance training must be completed by all staff as specified in current legislation.

### **Competence**

Each staff grade will have a specified set of competences based on their job description and scope of practice. Competences will be renewed on, for example, an annual basis.

Staff are expected to work within their own level of competence and highlight to their line manager any areas which require further training to achieve the correct level of competence required.

## 8. APPENDIX TWO – Expectations and Examples of the training programmes

A copy of the training program for the applying department will be required for first-time training approval request. The following should be Identified within the training program submitted for review:

- I. The secondment laboratory site and department should be identified within the training programme for modules completed while on secondment. (e.g., identify sites for Multidiscipline Specialist Portfolio completed across sites/departments other than the main training laboratory).
- II. It should be clear whether the method of evidence collection (assessment method) for modules will be through theoretical or practical assessment. Examples of assessment methods and intended evidence can be found within the Guidance Document for each qualification.
- III. Additional Notes columns for further information and list of any relevant competencies are encouraged.

**Sample Training Programme:** (This can be arranged according to your laboratory training requirements and flexibility depending on the nature of employment and availability of staff)

Specialist Diploma in Blood Sciences			
Portfolio Standard/Module	Main Training Site / Secondment Site		Type of Assessment conducted
7A.1a Laboratory Quality	Clinical Biochemistry	Main Training Laboratory	Observation, Questions set by trainer, Completion of Audits
7A.2a Laboratory Automation	Clinical Biochemistry		Observation, Questions set by trainer
7B.1a Cell Counting and Haemoglobin Concentration Measurement	Haematology & Transfusion Practice	Secondment Department (Off-site training)	Practical & Questions set by trainer
7C.1a Routine ABO/D Typing and Antibody Screening	Haematology & Transfusion Practice		Competency assessment(s), Question set by trainer, additional evidence, and viva

*Please note: these examples can be used, adapted, and incorporated into in-house documents.*

## **EXAMPLE TRAINING PROGRAMME FOR IBMS CERTIFICATE OF ACHIEVEMENT**

### **IBMS Certificate of Achievement**

The IBMS offers the Certificate of Achievement Part I and II, which provide a structured approach to training for laboratory support staff as well as an opportunity for staff to achieve a qualification and demonstrate the knowledge and skills required for their employment and potential career progression.

Once the portfolio is completed, the laboratory training officer/laboratory manager will contact the IBMS and confirm that the candidate has completed the portfolio to the appropriate standard and apply for validation. If successful, the candidate will receive a certificate and be eligible to apply to become an Associate member of the IBMS (if not already in that grade).

Candidates undertaking this qualification are expected to read the guidance notes and information available on the IBMS website ([www.ibms.org](http://www.ibms.org)).

### **Training Reviews**

Each candidate will have an assigned training officer who will oversee progress of the portfolio and will be the first point of contact to address any issues. There will be monthly reviews during which targets will be set and evidence reviewed.

### **Competence and Assessment**

There is a range of competence assessment methods which can vary depending on the individual and the portfolio requirements (e.g., direct observation, written question and answers, verbal question, and answers, EQA etc.).

Candidates must achieve the necessary level of competence according to the portfolio undertaken (Part I or Part II) and complete the set pieces of evidence. The individual Evidence of Achievement sections should be signed off by an appropriately qualified member of staff. However, each module should be signed off by the laboratory manager.

The training programme indicates appropriate in-house competences that should be covered in each section. Once competence has been achieved, they may trigger the sign off of a section in the evidence of achievement.

### **Part I**

Certificate of Achievement Part I requires completion of the 12 core modules and at least two optional modules. Selection of the optional modules will depend on the needs of the department and the candidate's personal interests. This will be negotiated by the candidate and training officer, and the optional modules for completion will be identified at the beginning of the training programme.

## **Part II**

Certificate of Achievement Part II requires completion of the 14 core modules and at least four optional modules. Selection of the optional modules will depend on the needs of the department and the candidate's personal interests. This will be negotiated by the candidate and training officer, and the optional modules for completion will be identified at the beginning of the training programme.

### **Portfolio Validation**

Once the portfolio is completed the laboratory manager will sign the declaration form to that effect, indicating that the trainee has demonstrated the necessary knowledge and skills.

A copy of the portfolio is not required for submission, although the IBMS reserves the right to request a copy of the Evidence of Achievement sections for the purposes of audit.

### **Duration of training and Rotation**

A member of staff undertaking the IBMS Certificate of Achievement is expected to complete the certificate in a 12-month period. However, the IBMS allows a maximum of three years for completion.

For new members of staff, there will be a period of induction prior to starting the training programme (not indicated in this training programme).

Each candidate is expected to follow the training programme indicated and will rotate through each section as required. The department will endeavour to follow this programme as closely as possible, but, due to leave and sickness, amendments may be made. The duration indicates the length of time it is expected for a candidate to achieve the necessary level of competence; however, this will vary for each individual.

Each rotation has indicated portfolio standards to be covered; these should not be viewed as exclusive as there will be crossover.

Candidates are expected to collate evidence as it becomes available, rather than waiting for the relevant rotation.

Owing to the range of tests undertaken by the department, there is no requirement to attend other departments or laboratories on secondment for additional training.

*Please note: these examples can be used, adapted, and incorporated into in-house documents.*

## **EXAMPLE TRAINING PROGRAMME FOR IBMS REGISTRATION PORTFOLIO**

### **IBMS Registration Portfolio**

The IBMS Registration Portfolio is a formal demonstration of an individual's fitness to practise as a biomedical scientist. Candidates undertaking this qualification are expected to read the guidance notes and information available on the IBMS website ([www.ibms.org](http://www.ibms.org)).

### **Certificate of Competence**

The IBMS Certificate of Competence is awarded to those who have demonstrated that they have met the Health and Care Professions Council (HCPC) standards of proficiency. This can be achieved through one of three main routes:

- Integrated degree (completion of the Registration Portfolio as part of the degree programme)
- IBMS-accredited degree plus Registration Portfolio (completion of Registration Portfolio can be completed after the degree)
- Non-accredited degree (plus completion of any supplementary education identified by the IBMS) and Registration Portfolio.

Successful candidates will be eligible to become a Licentiate member of the IBMS (if not already in that grade).

### **Training Reviews**

Each candidate will have an assigned training officer who will oversee progress of the portfolio and will be the first point of contact to deal with any issues. There will be a monthly review during which targets will be set and evidence reviewed. Please set a realistic review period such that issues can be identified and responded to in a timely manner.

### **Competence and Assessment**

There is a range of competence assessment methods which can vary depending on the individual and the portfolio requirements (e.g., direct observation, written question and answers, verbal question and answers, EQA etc.).

Candidates must achieve the necessary level of competence according to the portfolio undertaken and compile a portfolio of evidence demonstrating competence. The individual Evidence of Achievement sections should be signed off by an appropriately qualified member of staff.

The training programme indicates the appropriate in-house competences that should be covered in each section. Once competence has been achieved, this may trigger the sign off of a section in the Evidence of Achievement.

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### **Portfolio Verification**

Verification may only be arranged if the candidate has achieved competence in all parts of the Registration Portfolio and holds either an IBMS-accredited degree certificate or supplementary education as identified by the IBMS.

Upon completion, an application is made to the IBMS by the laboratory (application form available on IBMS website) to arrange an assessment visit by an external verifier.

Further details on the verification process can be found in the Registration Portfolio, and on the IBMS website.

### **Duration of training and Rotation**

A member of staff undertaking the IBMS Registration Portfolio is expected to complete the training within a 12-month period.

For new members of staff, there will be a period of induction prior to starting the training programme (not indicated in this training programme).

Each candidate is expected to follow the training programme indicated and will rotate through each section as required. The department will endeavour to follow this programme as closely as possible, but, due to leave and sickness, amendments may be made. The minimum duration indicates the minimum time it is expected for a candidate to achieve the necessary level of competence; however, this will vary for each individual.

Each rotation has indicated portfolio standards to be covered, but these should not be viewed as exclusive as there will be crossover, and candidates are expected to collate evidence as it becomes available, rather than waiting for the relevant rotation.

Owing to the range of tests undertaken by the department, there is no requirement to attend other departments or laboratories on secondment for additional training.

**Please note: these examples can be used, adapted, and incorporated into in-house documents.**

## **EXAMPLE TRAINING PROGRAMME FOR IBMS SPECIALIST DIPLOMA**

### **IBMS Specialist Diploma**

The IBMS offers Specialist Diplomas in a range of disciplines, which provide a structured approach to post-registration training and an opportunity for staff to achieve a qualification that demonstrates the specialist knowledge and skills required for *Agenda for Change* (AfC) Band 6 roles, or equivalent.

Once the portfolio is completed, the laboratory will apply for an examination, during which the candidate's knowledge and portfolio of evidence will be formally examined. If successful, the candidate will receive a certificate and be eligible to become a Member of the IBMS (MIBMS).

Candidates undertaking this qualification are expected to read the guidance notes and information available on the IBMS website ([www.ibms.org](http://www.ibms.org)).

### **Training Reviews**

Each candidate will have an assigned training officer who will oversee progress of the portfolio and will be the first point of contact to address any issues. There will be a monthly review during which targets will be set and evidence reviewed.

### **Competence and Assessment**

There is a range of competence assessment methods, which can vary depending on the individual and the portfolio requirements (e.g., direct observation, written question and answers, verbal question, and answers, EQA etc.).

Candidates must achieve the necessary level of competence and collect appropriate evidence according to the Evidence of Achievement requirements. The individual Evidence of Achievement sections should be signed off by an appropriately qualified member of staff. However, the internal assessor section should be signed off by the allocated training officer and will only be signed off once the candidate can demonstrate the necessary level of knowledge, competence, and evidence.

The training programme indicates appropriate competences that should be covered in each section. Once competence has been achieved, this may trigger completion of the competence section in the Evidence of Achievement.

### **Portfolio Examination**

Upon completion of the portfolio, an application is made to the IBMS by the laboratory (application form available on the IBMS website) to arrange a visit by an external examiner.

Further details on the examination can be found in the Specialist Portfolio and on the IBMS website.

### **Duration of training and Rotation**

A member of staff undertaking the IBMS Specialist Diploma is expected to complete the diploma over an 18-month period. The IBMS allows a maximum of three years for completion, until the portfolio expires.

For new members of staff, there will be a period of induction prior to starting the training programme (not indicated in this training programme).

Each candidate is expected to follow the training programme indicated and will rotate through each section as required. The department will endeavour to follow this programme as closely as possible, but, due to leave and sickness, amendments may be made. The minimum duration indicates the minimum amount of time it is expected for a candidate to achieve the necessary level of competence; however, this will vary for each individual.

Each rotation has indicated portfolio standards to be covered, which should not be viewed as exclusive as there will be crossover, and candidates are expected to collate evidence as it becomes available, rather than waiting for the relevant rotation (e.g., do not wait until working in 'specials' to collect evidence of a new leukaemia).

Owing to the range of tests undertaken by the department, there is no requirement to attend other departments or laboratories on secondment for additional training.

EXAMPL

## Frequently Asked Questions

### Laboratory Training Approval

#### ***Why do I need IBMS laboratory training approval?***

Institute training approval allows a laboratory to provide training to complete IBMS qualifications for support staff, pre-registration, and specialist level. If a laboratory does not hold training approval, you will not be able to undertake the corresponding IBMS qualification.

#### ***Who can achieve IBMS laboratory training approval?***

Any laboratory that can provide the necessary training and satisfy the criteria can gain IBMS laboratory training approval can apply for training approval in one or more categories. Depending on the service provided by the laboratory, it may not be desirable or possible to achieve all three categories for training approval.

#### ***When do I submit my document for re-approval for my department?***

We advise that all applications for renewal of approval be completed and submitted to the IBMS no later than 3 months before the laboratory training approval expires to ensure that this is renewed on or before the day of expiration.

#### ***How long does training approval take to achieve?***

The IBMS does not specify how long training should take. Indicative times are provided in section 2.5.1 of the guidance document. Depending on ability, experience, and local resources it may take more or less time than indicated. Please be aware that evidence should not be older than 3 years and portfolios are time-limited if new editions are published.

#### ***What happens if we have not applied for renewal of approval 6 month prior to the expiration date of the current training approval?***

The onus is on the training laboratory to apply for renewal. If training approval expires prior to granting further renewal no further portfolios for that level of approval/discipline can be issued to the laboratory until further approval is granted. The IBMS will honour portfolios being completed under the initial approval.

#### ***My department operates on multiple sites.***

If you have a department that is on multiple sites, where staff rotate over each site, and there is consistent training documentation and training staff, then the IBMS is able to grant training approval. However, you will need to provide information for all sites on the application form.

#### ***What if I already have laboratory approval?***

If your department holds current training approval for a laboratory you do not need to do anything. We suggest that three months prior to expiry you begin the process of applying for continued training approval.

#### ***I want to apply for a multidiscipline portfolio do I need approval in all disciplines?***

The department must have approval for each individual discipline which they are applying for within this portfolio.

***We have had multiple candidates complete a portfolio over the past couple of years. Why has our training approval expired?***

Training approval is for a fixed five-year period and is no longer updated after a portfolio is completed successfully. This was introduced in 2013 so any portfolio completed since then will not result in an updated expiry date.

***My department holds UKAS and/or MHRA accreditation. Why do I need to gain IBMS training approval?***

IBMS training approval allows laboratories to undertake training for IBMS qualifications. No other accreditation body covers the necessary checks to ensure that the appropriate training is in place to meet the standards required for the qualifications.

***What happens if I have been completing my portfolio in an approved laboratory and move to another laboratory that is not approved?***

End-point assessments will only be carried out if the laboratory takes responsibility for the portfolio. It may be possible for the candidate to be assessed in the laboratory where they have been previously trained (if this can be by agreed) or their new laboratory will have to apply for training approval.

***My department provides high-quality training, but our application has been rejected.***

An application is usually rejected due to missing information in the documentation. This does not automatically reflect on the training provided, but rather that the documentation needs to reflect the training which takes place.

## **General Information**

***Will the Institute issue a portfolio to a non-approved laboratory?***

No. The Institute will only issue portfolios to approved laboratories. This also applies to universities issuing portfolios to students on integrated placements.

***Do you need training approval for other post-registration qualifications (e.g., CEP, HSD)?***

No. Post-registration training approval is specific to the IBMS Specialist Diploma. Higher-level qualifications assume a greater proportion of self-directed learning rather than a structured training programme provided by the laboratory. However, we do expect approved laboratories to ensure that staff are aware of all IBMS qualifications.

***Can you apply for verification/examination if the laboratory training approval has expired?***

If the portfolio was issued to the laboratory requesting verification/examination prior to approval expiry, the application will be processed. No new portfolios will be issued until re-approval of training has been granted.

**For example:** Blood Sciences – This portfolio offers the option of applying for the minimum of two disciplines falling under this portfolio (*excluding Haematology and Transfusion alone for we have a separate portfolio hosting these two disciplines*). If the department wishes to host training for the Blood Sciences portfolio Clinical Biochemistry and Haematology or Clinical Biochemistry and Transfusion Science.

***Can I apply for individual disciplines in the Blood Sciences Portfolio?***

No. With Blood Sciences training approval alone, you can apply for the Blood Sciences portfolio but not for the individual disciplines within this portfolio.

***I have been issued with an IBMS portfolio but am not getting the training and support to complete it.***

If you experience any problem with training within a department your first step should be to highlight this to the laboratory manager. The IBMS can provide support and guidance when consulted; however, if an issue is not able to be resolved this may impact on the department's continued training approval.

***We have had multiple candidates complete a portfolio over the past couple of years. Why has our training approval expired?***

Training approval is for a fixed five-year period and is no longer updated after a portfolio is completed successfully. This was introduced in 2013 so any portfolio completed since then will not result in an updated expiry date.

## About this document

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