EXAMPLE 2

1a. Informal Interview with Candidate (15 – 20 minutes)

Based on requirements of meeting the HCPC SETs. STANDARD MET:	Y	N
Describe your formal trust and departmental induction process.	☒	☐
How were you made aware of the location of the policies on equal opportunities and anti-discrimination?	☒	☐
Describe what you should do if you feel that you may have been discriminated against or if you have concerns about the safety and well-being of service users.	☒	☐
How were you made aware of the grievance procedure and how to initiate it?	☒	☐
Do you feel you have followed a structured training programme?	☒	☐
Was your training supportive to satisfy all of the above?	☒	☐
Were there any difficulties in delivering your training?	☐	☒
Were there any other trainees?	☒	☐
Was all the training done on one site?	☒	☐
Was there any rotation or collaboration with other departments?	☐	☒
Can you give examples of being able to take part in inter-professional learning? (learning with and from other professionals)?	☒	☐

1b. Specific requirements to confirm standards for IBMS Approval for Pre-registration Training are being met.

Based on requirements of meeting the HCPC SETs. STANDARD MET:	Y	N
Was a copy of the training programme made available?	☒	☐
Does each trainee have a nominated HCPC registered training officer/mentor?	☒	☐
Do they have access to current textbooks and journals?	☒	☐
Do they have access to a quiet area for study?	☒	☐
Does the Department have a training notice board? (wall or electronic)	☒	☐
Does the Department have a Health & Safety notice board? (wall or electronic)	☒	☐

Did the candidate or training officer wish to make any further comments about the training process?
It had been an interesting and challenging process. Given the global pandemic, had obviously had an effect. XXXXXX had been well supported by the training team and the training officer in particular.

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2. Verification of the Registration Portfolio (maximum length – 90 minutes)

Please include your comments below on the candidate's disposition, only if you feel it may have affected the verification process.

Given that the verification process was carried out virtually it was difficult to judge how XXXXXX was feeling.

However she seemed to enjoy the process and appeared to be at her ease. She seemed confident and gave a very good accou8nt of herself.

SECTION 1 – PROFESSIONAL CONDUCT

SECTION 1 – Module 1: Personal Responsibility and Development

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 1.1, 1.2, 2.1, 2.2, 2.3, 2.4, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3, 4.4, 4.6, 11.1	☒	
Competence standards SoP numbers: 1, 2, 2.4, 2.7, 2.8, 3, 4, 4.1, 4.2, 4.3, 4.4, 4.5, 11, 14.1	☒	

COMMENTS

Please indicate the range of evidence provided, highlighting any strong or weak areas.
This was very thoroughly covered with lots of different types of evidence.
She covered: HCPC, CPD, (cakes and cases) with good apposite reflections. Well annotated evidence with examples from her practice. Personal examples of how she maintains her fitness to practice.
What behavioural characteristics are needed to practice professionally.
Duties and responsibilities of a BMS.

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SECTION 1 – Module 2: Equality and Diversity

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 5, 5.1	☒	
Competence standards SoP numbers: 6	☒	

COMMENTS

Please indicate the range of evidence provided, highlighting any strong or weak areas.

All aspects of equality and diversity were covered with a very good reflection of how E and D applies in the workplace. A clear understanding of protected characteristics, all the terms and polices involved.   Aware of the types of discrimination and how to mitigate them.

Well annotated evidence on the Equality at work act.

Annotated policies and how they are effected in the laboratory.

SECTION 1 – Module 3: Communication

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 8.3, 8.6, 8.7, 8.8, 8.9	☒	
Competence standards SoP numbers: 8, 8.1, 8.2, 8.4, 8.5, 14.34	☒	

COMMENTS

Please indicate the range of evidence provided, highlighting any strong or weak areas.

This was very thoroughly covered with lots of different types of evidence.

Some very good evidence, a series of scenarios where effective communication is vital, some of which could have been challenging. This clearly demonstrated the necessity of accurate and correct communication .

She covered all the types of communication encountered in the lab handover books, emails, different types of personal: verbal and none verbal communication.

Verbal and non-verbal communication.

SECTION 1 – Module 4: Patient Records and Data Handling		
HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standard SoP numbers: 7, 7.1, 7.2, 7.3, 10.2, 10.3, 10.5, 10.6	☒	
Competence standards SoP numbers: 7, 10, 10.1, 10.3, 10.4	☒	
COMMENTS		

Please indicate the range of evidence provided, highlighting any strong or weak areas.
All aspects of IG and patient confidentiality covered.
The importance of maintain confidentiality. How IG is effectively applied to a clinical laboratory.
Well aware of Caldicott and the roles and responsibilities involved.
The importance of back-up data
The importance of appropriate information with regard to the samples and the patient. How importance accuracy is as some data from patient information is legally required. Error logging with examples and an example of a Datix event whereby the wrong test were performed.

SECTION 1 – Module 5: Professional Relationships		
HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 9.2, 9.3, 9.5, 13.3, 13.4, 13.5	☒	
Competence standards SoP numbers: 9, 9.1, 9.4, 12.2	☒	
COMMENTS		

Please indicate the range of evidence provided, highlighting any strong or weak areas.
The importance of the contributions from the many health care professionals to patient care.
An excellent account of how a laboratory interacts with many other staff groups from IT, engineers, Drs, Nurses, phlebotomists.
The use of feedback questionnaires to assess how the service users rate the department,

IMPORTANT:

The candidate must produce a reflective statement on how the engagement with service users and learning with and from professionals and learners in other relevant professions has contributed positively to their professional development (HCPC SoP 9.3, 12.2)

Please comment specifically on this in terms of identified outcomes.

XXXXXX had provided an excellent reflection on how she had applied what she had learnt in the laboratory through interactions with other health care professional and how this contributed to her role, contribution and understanding. A very thorough piece of evidence covering the health care provision in the UK. How the various staff members she encountered had assisted in providing the service for the patient.

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SECTION 2 – PROFESSIONAL PRACTICE

SECTION 2 – Module 1: Professional Knowledge

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 13, 13.1, 13.2, 13.6, 13.7, 13.8	☒	
Competence standards SoP numbers: 14, 14.14, 14.17, 14.18, 14.19, 14.20, 14.21, 14.23, 14.24, 14.25, 15.6	☒	

COMMENTS

Please indicate the range of evidence provided, highlighting any strong or weak areas.

Gave an in depth of account of the techniques in which she had been trained, well-illustrated and easy to follow.

An excellent case study on systemic lupus erythematosus. This had been well illustrated and clearly explained.

Gave an in depth account of the what is required when verifying and validating a new technique.

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SECTION 2 – Module 2: Health and Safety		
HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 15, 15.1, 15.2, 13.11	☒	
Competence standards SoP numbers: 15.2, 15.3, 15.4, 15.5	☒	
COMMENTS		

Please indicate the range of evidence provided, highlighting any strong or weak areas.

Gave an account of how risks is assessed and mitigated. Policies and legislation and how they are effectively applied in a clinical laboratory. RIDDOR, DSE GLP, pathogens, biological and other forms of ricks.

Gave an account of and reflection upon the monthly Health and Safety walk thought he laboratory. Analysis of a Datix incident whereby a GP sample received was not from the patient.

SECTION 2 – Module 3: Quality		
HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 11.2, 12.3, 12.5, 12.7, 14.15, 14.16	☒	
Competence standards SoP numbers: 12, 12.1, 12.4, 12.5, 12.6, 12.8, 12.9	☒	
COMMENTS		

Please indicate the range of evidence provided, highlighting any strong or weak areas.

Gave a very good account of audit on the laboratory sample process, from receipt to results production and communication. Reflected on the importance of audit and how to apply the knowledge gained on a daily basis.

Gave an excellent account of the IQC and EQC performed in the laboratory, its importance and her role. Illustrated with examples of NEQAS schemes that she had been involved in.

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SECTION 2 – Module 4: Performing Standard Investigations

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 13.10, 14.22	☒	
Competence standards SoP numbers: 13.9, 14.2, 14.3, 14.4, 14.5, 14.6, 14.7, 14.8, 14.9, 14.10, 14.11, 14.12, 14.13, 14.26	☒	

COMMENTS
Please indicate the range of evidence provided, highlighting any strong or weak areas. Gave an account of the processing involved in introducing a new technique into the laboratory. Gave an account of the techniques in which she had been trained. Including evidence of her competency in these areas. A introduction to each of the tests performed in her laboratory and the techniques that underpin those techniques HLPC, Flow cytometry , immunoassay, spectrophotometry.

SECTION 2 – Module 5: Research and Development

HCPC STANDARDS OF PROFICIENCY COVERED	STANDARDS MET	PLEASE INDICATE WHICH (IF ANY) STANDARDS HAVE NOT BEEN MET
Knowledge standards SoP numbers: 14.30, 14.31	☒	
Competence standards SoP numbers: 14.27, 14.28, 14.29, 14.32, 14.33	☒	

COMMENTS
Please indicate the range of evidence provided, highlighting any strong or weak areas. Very good evidence of research techniques used in the field and how they can be effectively used in forwarding knowledge. This was illustrated by an account of immunolite technique that she had worked on. The value of research in evaluation current practice. Evidence based practice.

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OVERALL COMMENTS ON PORTFOLIO

A very good portfolio, well written and easy to follow.
The evidence provided met the required standard for each module/section. Excellent evidence of interaction with the student and the training team.

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3. Tour of Laboratory (maximum length – 40 minutes)

This is an opportunity to observe the training environment and candidate's knowledge and understanding of the service delivery. The candidate should be able to demonstrate an understanding of the routine service and respond correctly to pro-active questioning.

The criteria below should be verified in accordance with the knowledge and understanding of the candidate in respect of the discipline(s) in which their training has taken place.

CANDIDATE ABILITY	STANDARD MET	STANDARD NOT MET
Candidate was able to show they knew the correct procedures for handling specimens, pre and post analysis.	☒	☐
Candidate was able to show a knowledge and application of health & safety requirements.	☒	☐
Candidate was able to show they knew how to use the main laboratory computer system in accordance with service requirements.	☒	☐
Candidate was able to show they knew how to operate equipment used in the preparation and analysis of samples	☒	☐

COMMENTS
Please provide a brief summary of the topics covered on the tour and the candidate's scope of practice.   This was a good virtual tour/professional/discussion she covered covering pre-analytical aspects of sample processing, IQC, EQC, roles and responsibilities.   H and S, providing a demonstrable quality service. Limitations of practice.

The Institute has published 'Clinical Laboratory Standards' for the approval of laboratories for pre- and post- registration training. Based on these criteria, the laboratory tour also gives the external verifier an opportunity to judge whether the laboratory has the appropriate requirements for training against the standards below.

OVERALL STANDARDS	STANDARD MET	STANDARD NOT MET
Environment, Facilities and Equipment	☒	☐
Health and Safety	☒	☐
Workload and Staffing	☒	☐
Quality	☒	☐
Education and Training	☒	☐
Documentation	☒	☐

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4. Feedback Comments to Trainer and Candidates

This also provides an opportunity to seek further clarification on points of evidence if required.

FEEDBACK:

Thorough, good apposite evidence.

COMMENDATIONS: Highlight any areas of good practice.

RECOMMENDATIONS:

Please note this is meant to be constructive and helpful where you are able to suggest <u>one or two</u> areas where future training may benefit.

Recommendations must be consistent with IBMS guidelines for registration training and portfolio completion.

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5. Result of Verification

If completion of any academic study is still outstanding, the verifier should recommend the award of the Certificate of Competence subject to the relevant evidence being submitted to the Institute.

AWARD OF CERTIFICATE OF COMPETENCE RECOMMENDED

YES ☒   NO ☐

If degree has not been completed or if further evidence is required, please indicate below. (Continue on extra sheet if necessary.)

TRAINING APPROVAL OF THE LABORATORY RECOMMENDED

YES ☒   NO ☐

If No, indicate further evidence required. (Continue on extra sheet if necessary.)

IS THERE ANY PARTICULAR ISSUE YOU WISH TO BRING TO THE ATTENTION OF THE INSTITUTE?

No

I confirm that this external verification has been carried out in a
the guidelines provided and in line with the requirements of the,
Science and that the candidate is previously unknown to me.

Verifier Name:	
Signature:	

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