

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.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
How were you made aware of the location of the policies on equal opportunities and anti-discrimination?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
How were you made aware of the grievance procedure and how to initiate it?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do you feel you have followed a structured training programme?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Was your training supportive to satisfy all of the above?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Were there any difficulties in delivering your training?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Were there any other trainees?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Was all the training done on one site?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Was there any rotation or collaboration with other departments?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Can you give examples of being able to take part in inter-professional learning? (learning with and from other professionals)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does each trainee have a nominated HCPC registered training officer/mentor?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do they have access to current textbooks and journals?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do they have access to a quiet area for study?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does the Department have a training notice board? (wall or electronic)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does the Department have a Health & Safety notice board? (wall or electronic)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

<p>Did the candidate or training officer wish to make any further comments about the training process?</p> <p>It had been an interesting and challenging process. Given the global pandemic, had obviously had an effect.</p> <p>XXXXXX had been well supported by the training team and the training officer in particular.</p>
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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 he seemed to enjoy the process and appeared to be at his ease. He seemed confident and gave a very good account of himself.

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	<input checked="" type="checkbox"/>	
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	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>This was well covered with lots of different types of evidence.</p> <p>He covered: HCPC, CPD, with good apposite reflections. Well annotated evidence with examples from her practice. Personal examples of how he maintains his fitness to practice.</p> <p>A good example of when he had reached his level of competence. A good account of audit and a reflection on an audit in which he had been involved.</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 6	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>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 policies involved. He attended an E and D on line training course. Aware of the types of discrimination and how to mitigate them.</p> <p>A personal statement on his personal application of E and D in practice.</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 8, 8.1, 8.2, 8.4, 8.5, 14.34	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>This was well covered with lots of different types of evidence.</p> <p>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.</p> <p>He covered all the types of communication encountered in the lab handover books, emails, different types of personal: verbal and none verbal communication. This was well illustrated</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 7, 10, 10.1, 10.3, 10.4	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>All aspects of IG and patient confidentiality covered.</p> <p>The importance of maintain confidentiality. How IG is effectively applied to a clinical laboratory.</p> <p>Well aware of Caldicott and the roles and responsibilities involved.</p> <p>Scenarios where records had to accurately recorded for audit purposes.</p> <p>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.</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 9, 9.1, 9.4, 12.2	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>The importance of the contributions from the many health care professionals to patient care.</p> <p>Illustrated this with an account of a sample journey through the department and everyone that is involved in that process.</p> <p>Provided a questionnaire on how the users viewed the department and how they dealt with samples.</p>		
<p>IMPORTANT:</p> <p>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)</p> <p>Please comment specifically on this in terms of identified outcomes.</p> <p>XXXXXX had provided a good reflection on how he had applied what he had learnt in the laboratory through interactions with other health care professional and how this contributed to her role, contribution and understanding. How the various staff members she encountered had assisted in providing the service for the patient.</p>		

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	<input checked="" type="checkbox"/>	
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	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>Gave an account of how the laboratory stores and disposes of samples. This was covered in some depth. However I feel that although this demonstrated some “ professional “ knowledge this piece would have been better placed in Section 1 module one.</p> <p>A good account of anaemia, in its many manifestations. The tests involved in the diagnosis complete with an interesting case study.</p> <p>Gave an account of the tests performed in the laboratory and why they are performed.</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 15.2, 15.3, 15.4, 15.5	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>Gave an account risk management for the reagents used in the laboratory and how the risks are safely managed.</p> <p>The legislation pertaining to H and S and how it is applied in the clinical laboratory setting.</p> <p>PPE Manual Handling, DSE and RIDDOR</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 12, 12.1, 12.4, 12.5, 12.6, 12.8, 12.9	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas.</p> <p>Gave a good account of the IQC and EQC performed in the laboratory, its importance and his role. Illustrated with examples of NEQAS schemes that he had been involved in.</p> <p>POCT and how that service is provided and benefits for the patient. Asset management, audit and CAPA</p>		

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	<input checked="" type="checkbox"/>	
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	<input checked="" type="checkbox"/>	
COMMENTS		
<p>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.</p> <p>Gave a very thorough account of how a full blood count is performed, analyser methods, reagent QC. This was excellent Annotated results of coagulation tests and their relevance/clinical significance.</p>		

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	<input checked="" type="checkbox"/>	
Competence standards SoP numbers: 14.27, 14.28, 14.29, 14.32, 14.33	<input checked="" type="checkbox"/>	
COMMENTS		
<p>Please indicate the range of evidence provided, highlighting any strong or weak areas. Gave an account of research techniques used in the field and how they can be effectively used in forwarding knowledge. This was illustrated by a piece on malaria. Gave an account of evidence based practice and how it can be effectively used in the laboratory. Illustrated with a small study on ascorbic acid.</p>		

OVERALL COMMENTS ON PORTFOLIO

A good portfolio, well written and easy to follow.

The evidence provided met the required standard for each module/section.

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.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Candidate was able to show a knowledge and application of health & safety requirements.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Candidate was able to show they knew how to use the main laboratory computer system in accordance with service requirements.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Candidate was able to show they knew how to operate equipment used in the preparation and analysis of samples	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health and Safety	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Workload and Staffing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quality	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Education and Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documentation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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 one or two areas where future training may benefit.

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

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

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 www.ibms.org/privacy

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External verifiers report for the Verification of the Registration Training Portfolio for the Certificate of Competence