IBMS Institute of Biomedical Science

BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

# TRAINING PORTFOLIO

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## RECORD OF COMPLETION OF EDUCATION AND LABORATORY TRAINING

| | | |
|---|---|---|
| Name of Trainee: | Surname: | |
| | First Name: | |
| Date of Birth: | | |
| Address | | |
| Telephone number | | |
| Email address | | |
| IBMS Membership Number (if applicable) | | |
| Name and Address of Training Laboratory | | |
| Period of Training | From: | To: |
| Discipline(s) in which training received | | |
| Name of training officer(s) | | |

| **Recommendation for Award of Certificate of Achievement Part I** | | |
|---|---|---|
| Date of Completion | Laboratory Manager's Signature | Laboratory Manager's Name |
| | | |

# CERTIFICATE OF ACHIEVEMENT PART I

## 1. Introduction

The Institute's two-part qualification for biomedical support staff is specifically aimed at those working in laboratory services and relates directly to employer, and individual, training needs. The title of the qualification is the Institute's Certificate of Achievement Part I and Certificate of Achievement Part II.

The purpose of this qualification is to guide and assess the development of knowledge and skills in a range of support skills that underpin the biomedical science workforce.

These qualifications are highly flexible and can be used to support training and development in a range of biomedical science environments, not solely pathology laboratories. They are specifically designed for biomedical science support staff, and provide an affordable qualification option that will:

- Underpin the development of new or extended roles
- Promote closer alignment between service need and education/development by linking to the vocational elements of foundation degrees
- Provide a starting point for "grow your own" trainee biomedical scientists
- Provide evidence required for recognition of Institute members wishing to apply for voluntary registration with the Institute (RSciTech and RSci)
- Provide a national standard for the recognition of biomedical support staff
- Provide evidence of skills required for career progression (dependent on local arrangements)

Supporting the biomedical science workforce to be suitably knowledgeable and skilled so that it can advance and maintain high standards of professional practice is a prime aim of the Institute. The two parts of the qualification represent the two distinct levels of practice: academic level 3 (level 6 in Scotland) which equates to NHS career framework assistant practitioner roles and academic level 5 (level 8 in Scotland) which equates to NHS career framework associate practitioner roles.

The training portfolio for the Certificate of Achievement Part I is available to both IBMS members and non-members. Individuals will be required to complete all the core modules and a minimum of two optional modules that define knowledge and competence in areas that are relevant to their scope of practice (see table 1).

## 2. Structure of the Portfolio

The portfolio for the Certificate of Achievement Part I is made up of SECTIONS comprising of core and optional modules as shown in Table 1.

You will be required to complete all 12 core modules and a minimum of 2 optional modules to be eligible for the award of the Certificate of Achievement Part I. There is no restriction to completing additional modules to evidence a wider scope of practice but these will not contribute to a further award.

## Table 1. Certificate of Achievement Part I: Core and Optional Modules

| SECTIONS | | | | |
|---|---|---|---|---|
| Professional Roles | Health and Safety | Quality | Specimen Handling | Performing Standard Tests |
| **CORE MODULES** | | | | |
| Personal Responsibility and Development | Safety at Work | Maintaining Standards of Working Practice | Receiving Specimens | |
| Equality and Diversity | Maintaining a Healthy Environment | | Storage and Retrieval | |
| Communication | Cleaning and Decontamination | | Sample Disposal | |
| Data Handling | | | | |
| Contributing to Team Work | | | | |
| **OPTIONAL MODULES** | | | | |
| | Waste Management | Preparing Stock Solutions | Preparation of Specimens for Investigation | Simple Manual Method or Commercial Kit |
| | | Routine Maintenance of Laboratory Equipment | Specimen Packaging and Transport | Use of an Automated Analyser |
| | | | Obtaining Venous Blood Samples | |

Each module consists of sections that define the requirements for:

**KNOWLEDGE**

The knowledge statements are not an exhaustive list but are used to indicate the specific area of knowledge that applies to the scope of practice and standard operational procedures used. It is assumed that any local procedures, policies and protocols are based on relevant national guidelines and legislation.

**COMPETENCE**

The competence statements describe what you must be able to do and may be passive (what you need to know in order to do something) or active (what you must do to demonstrate the ability to do something).

**EVIDENCE OF ACHIEVEMENT**

Evidence of achievement has been tailored to ensure the required knowledge and skills for each module have been demonstrated and represents the scope of practice in which competence has been demonstrated to the required level. In addition there are defined tasks that must be completed and areas for comments/signatures by those responsible for the individual's training and work. Each individual section must be signed by both the trainee and trainer to ensure both parties agree the necessary learning outcome has been met.

The trainee must have demonstrated and the trainer must have observed the necessary skill or knowledge. The trainer must be an individual with the appropriate knowledge and skill but does not have to be the training officer or laboratory manager.

Unless otherwise directed a signature only is required as evidence. The only physical evidence required is detailed within each module and there are clear explanations as to the requirement for each piece of evidence. This should provide the trainee the opportunity to begin the skill of report writing. They should ensure their writing is clear and concise and answers the question or statement required.

**LINE MANAGERS COMMENTS BOX**

This box should not remain blank! A lengthy statement is not required but there should be evidence that the line manager has considered the trainees performance in relation to the knowledge and competence detailed in the relevant module.

**DEFINITIONS**

**Trainee** – This refers to the individual undertaking the qualification and does not refer to an employment grade.

**Trainer** – This refer to the individual responsible for signing off the relevant section of the portfolio. They should have already been deemed competent in the area and be of a higher employment grade.

**Training Officer** – This refers to the individual responsible for overseeing training within the department.

**Laboratory Manager** – The Laboratory Manager is responsible for proposing the trainee suitable for the award of the Certificate of Achievement Part I. They should have observed the trainee working to the standard required for the certificate and have checked each module has been completed.

## 3. Module Descriptors

To assist in choosing optional modules that are most relevant to a scope of practice or particular interest the following descriptions summarise the key elements of each module.

**CERTIFICATE OF ACHIEVEMENT PART I: CORE MODULES**

To be eligible for the award of the Certificate of Achievement Part I all 12 core modules in the following 4 sections are to be completed.

Please note there are no core modules in Section 5 (Performing Standard Tests).

**SECTION 1: PROFESSIONAL ROLES**

**Module 1: Personal Responsibility and Development**

Completion of this module requires an understanding of contractual responsibilities and expected behaviour, using the Institute of Biomedical Science Code of Conduct and Guide to Good Professional Practice as a reference point, together with other organisational standards. It's also about recognising one's own professional behaviour and responsibility for completing tasks and procedures, using judgement within defined parameters and being able to reflect on this and other learning opportunities to inform self-development.

**Module 2: Equality and Diversity**

This module is about acknowledging the equality and diversity of people and their rights and responsibilities. Whilst it is recognised that individuals are not always in a position to change and influence structures directly, they are expected to be proactive against discrimination. They must be able to handle a number of competing tensions with an individual themselves or between a group of individuals. Discrimination against people may occur for a wide range of reasons such as: differing abilities, age, class, caste, creed, culture, gender, health status, relationship status, mental health, offending background, place of origin, political beliefs, race, responsibility for dependents, religion, and sexuality.

**Module 3: Communication**

This module is about being able to demonstrate effective written and verbal communication with individuals in the work environment. Individuals will be expected to apply a variety of communication methods and approaches, appropriate to others and the situation, in order to facilitate and promote constructive outcomes. Trainees will be expected to be able to communicate effectively on difficult, complex and sensitive issues.

**Module 4: Data Handling**

This module is about the knowledge and skills needed to follow correct procedures for recording, sharing, storing and accessing information in the laboratory. Whilst particularly relevant to specimen reception it may also be applicable to other settings.

**Module 5: Contributing to Team Work**

This module is about sustaining the smooth and consistent working of a team in order to achieve the best results for service users. This is achieved by recognising and valuing the contributions of other team members and demonstrating the ability to work effectively with others.

**SECTION 2: HEALTH AND SAFETY**

**Module 1: Safety at Work**

This module is about managing and applying safe working practices in accordance with national legislation and organisational policy. It includes being able to recognise health and safety signage, the correct use of personal protective equipment, the correct handling of specimens and hazardous chemicals and being able to deal with untoward incidents.

**Module 2: Maintaining a Healthy Environment**

This module is to ensure the understanding of the potential for the spread of infection in the laboratory environment and how this may be overcome through good personal hygiene and use of personal protective equipment.

**Module 3: Cleaning and Decontamination**

This module is concerned with the cleaning and use of disinfectants for the decontamination of laboratory surfaces and equipment to minimise the risk of infection to laboratory staff and visitors. It recognises the requirement to ensure there is a safe laboratory environment for working in by self and others, and may have a wide range of applications.

**SECTION 3: QUALITY**

**Module 1: Maintaining Standards of Working Practice**

This module is to help develop an understanding of the importance of maintaining the quality of one's own work against the organisational and professional standards that are used to measure it. Individuals should be able to work consistently and effectively with minimal supervision and accept the responsibility for the quality of their work. It includes the monitoring of quality outcomes and acting on recommendations for improvement.

**SECTION 4: SPECIMEN HANDLING**

**Module 1: Receiving Specimens**

This module applies to the receipt of all types of specimens that will be used for biomedical investigation in a range of laboratory environments. It involves ensuring the correct identification of the specimen and suitability for its intended purpose.

**Module 2: Storage and Retrieval**

This module has a broad application and is relevant for all methods that require the safe storage and retrieval of biomedical specimens, in line with local and national guidelines.

**Module 3: Sample Disposal**

This module has a broad application and is relevant for all methods of disposal for biomedical specimens and their waste products.

**CERTIFICATE OF ACHIEVEMENT PART I: OPTIONAL MODULES**

To be eligible for the award of the Certificate of Achievement Part I individuals must complete at least 2 modules from the 8 optional modules that are currently available. There are no restricted combinations.

Please note there are currently no optional modules in Functional Section 1 (Professional Roles).

**SECTION2: HEALTH AND SAFETY**

**Module 4: Waste Management**

This module concerns the disposing of contaminated waste, including sharps, safely and in such a way to minimise the risk of acquiring and spreading infections.

**SECTION3: QUALITY**

**Module 2: Preparing Stock Solutions**

This module has a broad application and relates to the preparation of a wide range of solutions, including stains, buffers, reagents and culture media.

**Module 3: Routine Maintenance of Laboratory Equipment**

This module relates to routine maintenance of equipment prior to use. The standards are generic and can be used for each type of equipment within the scope of normal work activity.

**SECTION 4: SPECIMEN HANDLING**

**Module 4: Preparation of Specimens for Investigation**

This module can be applied to the processes by which specimens of all types are prepared in the pre-analytical stages of investigation. Individuals will only be required to demonstrate competence in one procedure and show they are able to ensure that specimens are maintained in optimal conditions and handled in a manner consistent with relevant guidelines and regulations.

**Module 5: Specimen Packaging and Transport**

This module covers the packaging of specimens in accordance with local protocols which are expected to comply with the requirements of national legislation. It includes the completion of the necessary documentation required to accompany the specimen. The packaging can be anything from a simple specimen bag to a custom made transportation box.

**Module 6: Obtaining Venous Blood Samples**

This module is aimed at those involved in the use of venepuncture/phlebotomy techniques and procedures to obtain venous blood samples for investigation.

**SECTION 5: PERFORMING STANDARD TESTS**

**Module 1: Simple Manual Method or Commercial Kit**

This module has a broad application and is relevant to all types of tests using a simple manual method or commercial kit. The methods may be used in a variety of laboratory settings, including the provision of Point of Care Testing but it is expected that results are checked and authorised by the appropriately qualified individual. Individuals completing this module are expected to demonstrate competence in one simple manual method or commercial kit, although the knowledge and skills acquired may be used for other similar methods.

**Module 2: Use of an Automated Analyser**

This module has a broad application and is relevant to all types of automated analyser. The analysers may be used in a variety of laboratory settings, including the provision of Point of Care Testing but it is expected that results are checked and authorised by the appropriately qualified individual. Individuals completing this module are expected to demonstrate competence in using one automated analyser although the knowledge and skills acquired may be used for other similar equipment.

## 4. Assessment Process

Evidence of competence in the areas defined by the modules is all confirmed through internal assessment of the outcomes of training in the workplace or in conditions resembling the workplace. As each component of the Evidence of Achievement section is completed a date and signature is entered.

Once the portfolio has been completed the laboratory manager completes the form declaring the trainee has completed the portfolio and has demonstrated the necessary knowledge and skill. In so doing they are taking professional responsibility to make the recommendation to the Institute for the award of the Certificate of Achievement Part I. The candidate will then be issued with the Certificate of Achievement Part I. As a member of the IBMS they will also be eligible to apply to become a Registered Science Technician.

Please note: The portfolio is NOT required for submission, although the Institute does reserve the right to request a copy of the Evidence of Achievement sections for the purpose of audit, review and standardisation.

## 5. Voluntary registration as a Registered Science Technician (RSciTech)

Success in the Certificate of Achievement Part I confers eligibility for Institute members to apply for admittance to the nationally recognised RSciTech register. Further information is to be found on the IBMS website at :
**http://www.ibms.org/go/practice-development/registered-science-technician**

## 6. Further Information

Further information regarding training, frequently asked questions (FAQ), etc can be found on the IBMS website. Alternatively queries can be sent to the following email address : **supportstaff@ibms.org**

## About this document

**Document title:** Biomedical Science Support Staff Training Portfolio for the Certificate of Achievement Part I

**Produced by:** IBMS Education and Professional Standards Committee

**Contact:** Executive Head of Education

**Version:** Edition 1

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**Comments:**



**About IBMS Publications**

The Institute publishes a wide range of professional and scientific publications and guidance. Further information and downloadable publications: **www.ibms.org/publications**

## IBMS vision and purpose

**About biomedical science**

Biomedical science is the application of the natural sciences to the study of medicine. Although relating principally to the causes, consequences, diagnosis and treatment of human disease, biomedical science is used in other areas, such as academia, research and veterinary medicine.

It has been estimated that approximately 70% of medical decisions or interventions require the knowledge and expertise of biomedical science. This may range from the results of simple blood tests, the identification of disease causing organisms, the monitoring of chronic conditions (for example diabetes), through to more complex situations such as interpreting and reporting abnormal cervical cytology. Those who practice biomedical science must be competent and professional because lives may depend upon their knowledge and skills.

**IBMS vision**

The Institute of Biomedical Science (IBMS) is the professional body for those who work within the field of biomedical science. Its principal aims are to represent its members, set standards of behaviour for its members, enable career development, educate its members, promote biomedical science to the public and award qualifications appropriate to the collective knowledge and skill base of its members.

The Institute was founded in 1912 and represents over 19,000 members employed predominately within the healthcare arena, but also within university and veterinary laboratories, government agencies and other services. Other members also work in related commercial fields and academia. Although most Institute members live and work in the United Kingdom and the Republic of Ireland, many other members are employed throughout the world.

**IBMS roles**

- To aid and support the development of biomedical science, both nationally and internationally.
- Develop professional standards to guide those who practice biomedical science and to ensure patient safety.
- Assess competence to practise as Health and Care Professions Council (HCPC) registered biomedical scientists.
- Represent the interests of biomedical science, provide advice and work with UK governments, public & independent healthcare providers, media, universities, industry and commercial sector, professional organisations and all other partners.
- Provide professional support and benefits for members.
- Develop qualifications, training and diplomas for members to demonstrate levels of expertise and competency along a career pathway.
- To enable members to achieve their highest potential via continuing professional development and other professional activities.
- Inform and guide biomedical scientists through media, professional and scientific publications, meetings and events.
- Promote public awareness of biomedical science.
- Award the designations Registered Science Technician, Registered Scientist and Chartered Scientist to qualifying members.
- Fund research and support charitable causes in biomedical science.
- Maintain a historical archive of the Institute and biomedical science profession.

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IBMS Institute of Biomedical Science



BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

## SECTION 1 | PROFESSIONAL ROLES

| | | |
|---|---|---|
| **Module 1** | **Core** | Personal Responsibility and Development |
| **Module 2** | **Core** | Equality and Diversity |
| **Module 3** | **Core** | Communication |
| **Module 4** | **Core** | Data Handling |
| **Module 5** | **Core** | Contributing to Team Work |

# SECTION 1 | PROFESSIONAL ROLES

## CORE MODULE 1 : Personal Responsibility and Development

### KNOWLEDGE

- Know the duties, responsibilities and expectations of own role.
- Understand how the Institute of Biomedical Science Code of Conduct and Guide to Good Professional Practice apply to own role.
- Know the minimum organisational standards required for the maintenance and development of own role.
- Recognise how own actions and attitudes may affect working practice of self and others.
- Know the purpose of reflective practice.

### COMPETENCE

**You must be able to:**

- Describe the duties and responsibilities of own work role.
- Work within the limits of responsibility assigned to scope of practice.
- Work in accordance with the Institute of Biomedical Science Code of Conduct and Guide to Good Professional Practice applies to own role.
- Work consistently in line with organisational standards.
- Appraise own knowledge and performance against relevant standards for scope of practice.
- Apply the principles of reflection to review own practice.
- Assist in the identification of own training needs and to help draw up own personal development plan (PDP).
- Maintain competence and evidence for a personal development portfolio.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Works consistently and effectively with others and with minimal supervision to perform the duties, responsibilities and expectations of own job role. | | | | |
| Works in accordance with the Institute of Biomedical Science Code of Conduct and Guide to Good Professional Practice. | | | | |
| Shows compliance with the organisational/ departmental Code of Conduct e.g. adheres to dress code, being punctual and reporting when late. | | | | |
| Seeks advice when limit of responsibility has been reached and further action is required. | | | | |
| Reflects upon own practice and uses it to improve the quality of service provided. | | | | |
| Has demonstrated the ability to work with others to review and prioritise own learning needs. | | | | |
| Has participated in own appraisal and demonstrated production of own PDP. | | | | |
| Identifies negative and positive actions and their effect on working practice. | | | | |
| Has identified where and how to get information and advice for planning and reviewing own development. | | | | |
| Maintains competence and evidence for personal development portfolio. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |
| Has completed Evidence Four | | | | |

## Module 1: Evidence One

Think about your role. Describe three main areas of your work. Provide an example where advice was sought when limit of responsibility was reached and further action was required.

You should be able to provide a personal experience of this.
**Hint:** Think about the last time you asked someone a question.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Two

Provide a statement of what 'reflective practice means and how useful it is in improving your work with colleagues.

The trainee may need to have the term "reflective practice" explained.
We all practise it but don't necessarily recognise it as such.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Three

Give a negative and positive example where own actions and attitudes have affected working practice.

Positive Example:

Negative Example:



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Four

Provide an example which demonstrates how competence and personal development has been maintained.

**Hint:** How do you ensure you perform well?  How do you improve?



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module One to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 1 | PROFESSIONAL ROLES

## CORE MODULE 2 : Equality and Diversity

### KNOWLEDGE

- Recognise the importance of local policies for diversity and equal opportunities.
- Understand how equality and diversity policies and procedures apply to own scope of practice.
- Know how to report incidences of discrimination.

### COMPETENCE

**You must be able to:**

- Promote equality and inclusion by practising in a non-discriminatory manner.
- Treat all work colleagues and service users with equality, dignity and respect.
- Interact with staff and service users in ways which respect other people's cultures and beliefs.
- Report an incidence of discrimination in the work place to support an inclusive society.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has read and is able to paraphrase local policy on diversity and equal opportunities. | | | | |
| Works in a way which demonstrates equal opportunities and diversity when interacting with colleagues and service users in the work place. | | | | |
| Has described how to report discrimination. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 2: Evidence One

Write a short paragraph to summarise your understanding of local policy on diversity and equal opportunities and how it affects you in the work place.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Two

Write a personal statement, countersigned by your Line Manager, describing how you apply your knowledge of equal opportunities and diversity when interacting with colleagues and service users in the work place.

This is often done without conscious thought. Think about a recent interaction. How did you ensure both you and others were treated fairly?



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Two to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 1 | PROFESSIONAL ROLES

## CORE MODULE 3 : Communication

### KNOWLEDGE

- Understand how the policies and procedures for customer care apply to own scope of practice.
- Know the principles of verbal and non-verbal communication.
- Know how different forms of communication can impact on working relationships within the team and with service users.
- Know of barriers to effective communication.
- Understand that there are standard operating procedures for dealing with enquiries and giving advice to service users.

### COMPETENCE

**You must be able to:**

- Summarize the principles of verbal and non-verbal communication.
- Distinguish barriers to effective communication.
- Correctly apply differing modes of communication within the work-place setting.
- Respond to routine requests with accurate and current information.
- Clearly convey information to the appropriate level of detail.
- Confirm understanding of those to whom information has been given.
- Identify when it is inappropriate to communicate sensitive information.
- Use the laboratory information management system to input and retrieve data in response to enquiries.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has completed courses where applicable and can summarise how the policies and procedures relevant to communicating information and customer care can apply to job role. | | | | |
| Demonstrates effective communication skills. | | | | |
| Modifies behaviour to overcome poor communication when it occurs. | | | | |
| Successfully participated in the simulated task (Evidence Four) to show they deal appropriately with the situation. | | | | |
| Has reflected on difficult situations that may affect future communication and proposed a way they could resolve them. | | | | |
| Has demonstrated methods of checking that information is understood by the recipient. | | | | |
| Has explained where to go to seek advice regarding communication issues. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |
| Has completed Evidence Four | | | | |

## Module 3: Evidence One

Complete the table below. List 3 different ways to communicate, when to use them and the advantages and disadvantages of each.

| Communication | When used | Advantages | Disadvantages |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 3: Evidence Two

Outline a situation when you experienced poor communication in the workplace, why you think it arose and the action you took to resolve it.

Poor communication is usually identified retrospectively when something has gone wrong! This doesn't have to be an incident, it could be a minor issue.

Situation

Why did it arise?

Action Taken

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 3: Evidence Three

Identify and explain 2 factors which help to develop and improve good communication.

Factor One:

Factor Two:



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 3: Evidence Four

Simulated Task: You receive a telephone call from someone who you have difficulty in understanding and who wants information that you are not authorised to give.

Record how you responded to the situation, what you learnt and how this could improve future communication.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Three to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 1 | PROFESSIONAL ROLES

## CORE MODULE 4 : Data Handling

### KNOWLEDGE

- Recognise how information governance relates to own scope of practice.
- Know the local guidelines and procedures for handling and recording laboratory data.
- Be aware of a range of terminology used in relation to specimen test requests.
- Understand the need to maintain accurate data.

### COMPETENCE

**You must be able to:**

- Summarise key aspects of data handling.
- Correctly input and retrieve data from the laboratory information system.
- Demonstrate compliance in respect to confidentiality in accordance with local procedures.
- Apply knowledge of terminology (medical, biological, scientific, technical) in relation to data entry for laboratory test requests.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has completed courses and summarised how information governance policies relate to handling information in own job role. | | | | |
| Has recognised various forms of confidential data found within the working environment. | | | | |
| Applies personal password responsibly when handling data. | | | | |
| Demonstrates the ability to input and retrieve data accurately. | | | | |
| Has summarised the procedure for alerting senior staff to breaches of confidentiality and non-compliance within Information Governance. | | | | |
| Can translate terminology encountered within the workplace that is relevant to their scope of practice. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 4: Evidence One

Complete the table below. Identify 4 examples of confidential data found in the department and indicate where they are located, what their purpose is and who has access to them.

You probably deal with confidential data on a daily basis.
Think back to what forms of data you have dealt with.

| Example of Confidential Data | Location | Purpose | Access |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 4: Evidence Two

A friend asks you to look up a result of a laboratory test and comment on the accuracy of the information.
Record how you responded to the request. What did you learn? How will this affect your future handling of a similar situation?



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 4: Evidence Three

List 10 terms and abbreviations that are commonly used in your work and define each one. Provide an example to illustrate their use.

| Term/Abbreviation | Definition | Example of use |
|---|---|---|
| | | |
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|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Four to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 1 | PROFESSIONAL ROLES

## CORE MODULE 5 : Contributing to Team Work

### KNOWLEDGE

- Be aware of the current Human Resources key local policies that contribute to effective team working.
- Recognise the roles and responsibilities of other staff groups within the laboratory and of other professional groups, and how they may impact on customer care.
- Understand the importance of own role in the team.
- Understand the importance of effective communication for good team work.
- Understand the importance of teamwork to ensure an efficient quality service.
- Know how to contribute to creating a supportive environment for team work in the workplace.

### COMPETENCE

**You must be able to:**

- Recognise where local policies apply to effective team working.
- Summarise the different roles in the department and how they relate to own scope of practice.
- Work effectively as part of a team within your own scope of practice.
- Demonstrate support for the team in delivering a quality service.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has identified how local policies and procedures contribute to effective team working. | | | | |
| Has outlined the management structure in the department, and responsibility and main duties of each role in relation to own scope of practice. | | | | |
| Interacts positively with other staff in the department, or who use the laboratory service relative to scope of practice. | | | | |
| Identifies own role within a team and how it contributes to achieving the team objectives. | | | | |
| Recognises the responsibility of their line manager and responds according to the line of accountability. | | | | |
| Maintains confidentiality of information on other team members. | | | | |
| Operates as a supportive member of the team. | | | | |
| Reports issues affecting team performance. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |
| Has completed Evidence Four | | | | |

## Module 5: Evidence One

Draw a Flow Chart to illustrate the management structure in your department.

For each position (e.g. different grades of staff) give a brief outline of their key responsibilities.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 5: Evidence Two

Create a list the other departments and key staff who have contact with the laboratory service in which you work. Describe one example of your interaction with them.

| Department | Key Staff |
|---|---|
| | |
| **Example of Interaction** | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 5: Evidence Three

Complete the table below to show how individual roles contribute to achieving the team objectives.

Who do you work with? What jobs do you all do?

| Team Member | Role | Contribution to Team Objective |
|---|---|---|
| | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 5: Evidence Four

Identify 2 actions and 2 behaviours and briefly describe why they could produce an ineffective team.

Action One:

Action Two:

Behaviour One:

Behaviour Two:



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Five to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

IBMS Institute of Biomedical Science



BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

## SECTION 2 | HEALTH AND SAFETY

| | | |
|---|---|---|
| **Module 1** | **Core** | Safety at Work |
| **Module 2** | **Core** | Maintaining a Healthy Environment |
| **Module 3** | **Core** | Cleaning and Decontamination |
| **Module 4** | **Optional** | Waste Management |

# SECTION 2 | HEALTH AND SAFETY

## CORE MODULE 1 : Safety at Work

### KNOWLEDGE

- Understand the need for mandatory organisational and departmental induction courses at start of employment.
- Recognise how health, safety and security legislation, policies and procedures apply to own role.
- Understand how to follow the procedure for responding to untoward incidents, including biological or chemical spillages.

### COMPETENCE

**You must be able to:**

- Take personal responsibility for safe working practices in accordance with organisational and departmental induction policies on health and safety.
- Work in accordance with health and safety policies and procedures when handling hazardous substances.
- Recognise untoward incidents and take correct action in accordance with local procedures.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has outlined own responsibilities, together with those of others and the employer for health, safety and security within the laboratory. | | | | |
| Has demonstrated where to locate relevant health and safety documents in the department. | | | | |
| Has paraphrased health and safety documents in the department relevant to own scope of practice. | | | | |
| Has named the representatives and their deputies in the department for:<br>a) H&S<br>b) First Aid<br>c) Fire | | | | |
| Has demonstrated they know what action to take to deal with security issues. | | | | |
| Has demonstrated they know the importance of COSHH in the workplace by working to local health and safety policies. | | | | |
| Has performed a risk assessment relative to their scope of practice to demonstrate they understand its purpose. | | | | |
| Has shown where personal protective equipment (PPE) is available in the department and described when it is used and what its limitations are. | | | | |
| Correctly uses all PPE available, relevant to scope of practice. | | | | |
| Can recognise stressful situations in the workplace that are applicable to own scope of practice and actions to resolve them. | | | | |
| Has demonstrated how to deal correctly with a biological spillage on the work surface. | | | | |
| Follows the correct procedure to report:<br>a) faults,<br>b) problems and<br>c) incidents | | | | |
| Has described where and when to seek advice on health and safety matters. | | | | |

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has attended statutory and mandatory training for: | | | | |
| i) Fire | | | | |
| ii) Health and Safety Awareness | | | | |
| iii) Manual handling | | | | |
| iv) Others | | | | |
| | | | | |
| Takes appropriate action when seated at a computer workstation for more than 2 hours? | | | | |
| Correctly identifies the following warning signage: | | | | |
| i)  | | | | |
| ii)   | | | | |
| iii)   | | | | |
| iv)  | | | | |
| v)   | | | | |
| vi)  and  | | | | |
| vii) Others applicable to job role | | | | |
| | | | | |

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has described how to recognise infectious biological material at reception and followed the procedure for alerting senior staff for immediate intervention. | | | | |
| Has given examples that help to ensure the work environment is safe and reduce accidents. | | | | |
| Has correctly completed health and safety documentation when following laboratory protocols, e.g. equipment maintenance logs, pre-service decontamination reports. | | | | |
| Follows the correct procedures for dealing with hazardous waste within scope of practice | | | | |
| Continually maintains security of self, others and the department. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 1: Evidence One

Outline the employer's, other staff and own responsibilities for health, safety and security within the laboratory in the sections below.

| Employers Responsibility: |
|---|

| Own Responsibility: |
|---|

| Others Responsibility: |
|---|

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Two

In the table list all the personal protective equipment (PPE) relevant to your scope of practice that is available in the department and describe when it is used and its limitations.

| PPE | Usage | Limitations |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Three

Identify 2 causes of stress within your workplace. Summarise the effects of stress and ways to manage it in the future.

| | | |
|---|---|---|
| Causes of Stress: | | |
| Effect of Stress: | | |
| Ways to manage stress: | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module One to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 2 | HEALTH AND SAFETY

## CORE MODULE 2 : Maintaining a Healthy Environment

### KNOWLEDGE

- Understand the application of local policies and procedures to prevent the contact and spread of infection.
- Know of different agents that cause infections.
- Recognise how disease can be spread in a laboratory environment.
- Understand the need for good personal hygiene to prevent the spread of infection.

### COMPETENCE

**You must be able to:**

- Outline where local policies and procedures are used to prevent contact and spread of infection.
- Describe the main agents that cause infection.
- Describe how disease is spread relevant to own scope of practice.
- Demonstrate good hand washing technique.
- Demonstrate the application of personal hygiene and correct use of PPE in accordance with local policy and procedures.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has outlined the local policies that apply to prevent contact and spread of infection. | | | | |
| Has identified reasons for environmental cleaning. | | | | |
| Has shown they understand what is meant by "infection" and identified the main categories of infectious agents in the laboratory. | | | | |
| Has named common sources of infection in a laboratory and outlined how they spread, the method of entry into the body to cause infection and how this may be prevented. | | | | |
| Has described ways of working to help minimise the spread of infection within working environment. | | | | |
| Follows the correct procedures for the use of PPE and disposal of used PPE. | | | | |
| Has described when and why hand washing should be carried out and what type of products should be used. | | | | |
| Demonstrates good hand washing technique in accordance with WHO standards. | | | | |
| Works in a way that demonstrates own health and hygiene do not pose a risk to others within the department. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 2: Evidence One

Complete the table below. List 3 common sources of infection in a laboratory. State how the organisms could be spread, the method of entry into the body to cause infection and how to prevent spread.

You don't need specialist knowledge to complete this.

| Source of Infection | Mode of Spread | Method of entry | Prevention |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Two

Describe 2 ways of working to help minimise the spread of infection within the working environment.

**Hint:** What do the Government advertise to prevent the spread of infection?

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Three

Provide a statement to show that you work in a way that demonstrates your own health and hygiene does not pose a risk to others within the department.

You should be doing this every day.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Two to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 2 | HEALTH AND SAFETY

## CORE MODULE 3 : Cleaning and Decontamination

### KNOWLEDGE

- Understand how the application of local policies and procedures regarding cleaning and decontamination apply to own scope of practice.
- Know the hazards and risks associated with the cleaning and decontamination.
- Know the health and safety precautions for cleaning and decontamination of laboratory surfaces and equipment.
- Know own responsibilities for cleaning and decontamination.

### COMPETENCE

**You must be able to:**

- List the reasons and stages of the decontamination process.
- Use cleaning agents and disinfectants correctly.
- Decontaminate laboratory equipment in accordance with local departmental procedures.
- Complete the records required in accordance with local procedures for your area of activity.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has outlined the reasons for and stages of the decontamination process. | | | | |
| Has listed different disinfectants and cleaning agents used within the laboratory, their strengths where applicable, when they are used and how to ensure they are active. | | | | |
| Has explained where to go to seek advice with cleaning and decontamination. | | | | |
| Correctly prepares the different disinfectants used within the department to the correct strengths. | | | | |
| Uses the correct procedure and agent for cleaning and decontamination of: | | | | |
| i) Benches and Worktops | | | | |
| ii) Centrifuges | | | | |
| iii) VDUs and keyboards | | | | |
| iv) Fridges/freezers/Incubators | | | | |
| v) Telephones | | | | |
| vi) Instruments used within the department | | | | |
| vii) Analysers used within the department | | | | |
| Consistently maintains a clean and tidy working environment within the department. | | | | |
| Has completed Evidence One | | | | |

## Module 3: Evidence One

Write down the different disinfectants and cleaning agents used within the laboratory, their strengths where applicable, when they are used and how to ensure they are active.

| Disinfectant/Cleaning Agent | Strength | Usage | Activity |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Three to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 2 | HEALTH AND SAFETY

## OPTIONAL MODULE 4 : Waste Management

### KNOWLEDGE

- Know how local policies and procedures for waste management apply to own scope of practice.
- Know the appropriate containment requirements for waste disposal within scope of practice.
- Know the hazards and risks associated with the disposal of waste products.
- Know how to handle waste management safely.
- Know own responsibilities for waste management.

### COMPETENCE

**You must be able to:**

- Confirm suitability of containers provided for the disposal of biological samples and waste.
- Work in a safe manner when carrying out procedures for disposal of the different streams of waste management within the laboratory.
- Complete records of waste disposal in accordance with local procedures.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has listed different waste that is generated from the laboratory and the methods used for its disposal. | | | | |
| Correctly follows the procedure to remove dirty laboratory clothing and collect clean ones within the department. | | | | |
| Correctly follows procedures within their scope of practice when dealing with waste management. | | | | |
| Has explained where to go to seek advice with waste management. | | | | |
| Stores and correctly disposes of: | | | | |
| i) Hazardous waste (includes high risk) | | | | |
| ii) Sharps waste | | | | |
| iii) Confidential waste | | | | |
| iv) Cardboard non-hazardous waste | | | | |
| v) Plastic non-hazardous waste | | | | |
| vi) Chemical waste | | | | |
| vii) Paper waste | | | | |
| viii) Others relevant to scope of practice – please list | | | | |
| Has completed Evidence One | | | | |

## Module 4: Evidence One

Complete the table below identifying the different waste that is generated from the laboratory and the methods used for its disposal.

| Type of Waste | Method of Disposal |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Four to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

IBMS Institute of Biomedical Science



BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

## SECTION 3 | QUALITY

| | | |
|---|---|---|
| **Module 1** | **Core** | Maintaining Standards of Working Practice |
| **Module 2** | **Optional** | Preparing Stock Solutions |
| **Module 3** | **Optional** | Routine Maintenance of Laboratory Equipment |

# SECTION 3 | QUALITY

## CORE MODULE 1 : Maintaining Standards of Working Practice

### KNOWLEDGE

- Recognise the importance of providing a quality management system to service users.
- Know how professional standards and codes of practice apply to own scope of practice.
- Know which quality performance procedures are relevant within own scope of practice and how to monitor against them.
- Know key quality terms and their relevance to maintaining standards.
- Know how deviations from agreed working procedures may influence the quality outcomes and reliability of the work.

### COMPETENCE

**You must be able to:**

- Contribute to the maintenance of the quality management systems and continual quality improvement.
- Describe how professional standards and key quality terms are relevant to own work activities.
- Demonstrate personal responsibility and accountability for the quality of work by monitoring against relevant quality indicators.
- Identify sources of information that support the working practices where required.
- Correctly identify where work has deviated from relevant quality indicators.
- Act on recommendations to improve performance and quality outcomes.
- Complete records accurately, timely and in the correct location.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Can outline the department's need to comply with organisational governance and quality management systems. | | | | |
| Recognises the purpose of quality documents that are used within scope of practice. | | | | |
| Contributes to maintaining the quality management system in relation to their scope of practice. | | | | |
| Identifies and takes appropriate action within the responsibility of their work activities. | | | | |
| Conducts all work in a timely manner and to the required quality standards. | | | | |
| Checks that quality outcomes of their own work meet the expected performance criteria and conforms to expected standards. | | | | |
| Correctly identifies if work has deviated from expected quality standards. | | | | |
| Acts on recommendations to improve performance and quality outcomes. | | | | |
| Maintains full, accurate and legible records of the quality performance checks within area of responsibility. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 1: Evidence One

Complete the following table defining the terms and their relevance to maintaining standards of practice.

| Term | Definition | Relevance |
|---|---|---|
| Quality Management System | | |
| Audit | | |
| Internal Quality Control | | |
| External Quality Assurance | | |
| Document Control System | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Two

List 3 'quality' documents that are used within your scope of practice. Outline the purpose of each document.

| Quality Document | Purpose |
|---|---|
| | |
| | |
| | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Three

Summarise how you recognise that you have a personal responsibility for the quality of your own work.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module One to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 3 | QUALITY

## OPTIONAL MODULE 2 : Preparing Stock Solutions

### KNOWLEDGE

- Know the local policies and standard operating procedures for preparing a range of stock solutions.
- Know the factors influencing the preparation of stock solutions and implications of failing to recognise them or take corrective action.
- Know the hazards and risks associated with the preparation of stock solutions and how to assess and manage these.
- Know the safe use of protective cabinets, extraction hoods and personal protective equipment.
- Know how to operate relevant equipment used for the preparation of stock solutions in accordance with manufacturers instructions.
- Know the correct storage conditions for each product.
- Know why it is important to complete all necessary documentation accurately and in accordance with standard operation procedures.

### COMPETENCE

**You must be able to:**

- Follow procedures and protocols correctly and to the required standard.
- Weigh, measure and dispense powders and solutions accurately.
- Adhere to specific health and safety or handling procedures during the preparation process.
- Use all relevant equipment in a safe and correct manner.
- Record batch information and complete documentation accurately in accordance with standard operating procedures.
- Store products correctly and maintain rotation of stock as necessary.
- Take appropriate action to respond to an unexpected problem or situation.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has read and understood the standard operating procedures and related documents. | | | | |
| Follows procedures and protocols correctly and to the required standard. | | | | |
| Uses all relevant equipment in a safe and correct manner. | | | | |
| Weighs, measures and dispenses powders and solutions accurately. | | | | |
| Follows specific health and safety or handling procedures during the preparation process. | | | | |
| Records all batch information accurately. | | | | |
| Completes documentation accurately in accordance with standard operating procedures. | | | | |
| Does not exceed limits of knowledge and scope of practice with regard to preparation of stock solutions. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 2: Evidence One

Using brief notes outline the key stages in the preparation of a stock solution used in your laboratory. Identify one consequence of not preparing the solution correctly.

| | |
|---|---|
| Name of Stock Solution | |
| Purpose | |
| Equipment Used | |
| Key stages of preparation | |
| Consequence of not preparing correctly | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Two

Write a brief summary on how feel you have shown an awareness of own scope of practice with regard to preparation of stock solutions.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Two to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 3 | QUALITY

## OPTIONAL MODULE 3 : Routine Maintenance of Laboratory Equipment

### KNOWLEDGE

- Understand the principles and policies for routine maintenance of equipment within scope of practice.
- Know procedures for routine maintenance of equipment within scope of practice.
- Understand the implications of not performing routine maintenance on equipment.
- Know why it is important to complete all necessary documentation accurately and in accordance with standard operating procedures.
- Understand own level of competence, authority and knowledge base with respect to routine maintenance of a limited range of manual and automated equipment.

### COMPETENCE

**You must be able to:**

- Describe the importance of routine maintenance of equipment.
- Perform routine maintenance and monitoring of equipment in accordance with standard operating procedures and within own scope of practice.
- Complete documentation accurately in accordance with standard operating procedures.
- Notify appropriate person of the status of the equipment, seeking advice if necessary.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has read and understood the standard operating procedures and related documents. | | | | |
| Can describe a range of quality aspects of a piece of equipment used within scope of practice, including: frequency of maintenance procedure; the consequences of not performing the maintenance checks; records kept; quality assurance checks and dealing with problems. | | | | |
| Can assess the decontamination status and requirements of the equipment to be maintained. | | | | |
| Performs daily, weekly and monthly maintenance on named equipment. | | | | |
| Takes appropriate quality measures to check maintenance has been performed correctly. | | | | |
| Records accurate information with regard to maintenance and quality checks. | | | | |
| Identifies minor errors and takes corrective action within scope of practice. | | | | |
| Does not exceed limits of knowledge and scope of practice with regard to repair of equipment. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 3: Evidence One

Using brief notes complete the following table with reference to a piece of equipment that you use within your scope of practice.

| | |
|---|---|
| Name of equipment | |
| Purpose | |
| Maintenance<br>■ Routine Checks (including Frequency)<br>■ Documentation<br>■ Quality Assurance<br>■ Consequences of not performing routine maintenance. | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 3: Evidence Two

Write a brief summary on how feel you have shown an awareness of own scope of practice with regard to routine maintenance of the equipment.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Three to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

IBMS Institute of Biomedical Science



BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

## SECTION 4 | SPECIMEN HANDLING

| | | |
|---|---|---|
| **Module 1** | **Core** | Receiving Specimens |
| **Module 2** | **Core** | Storage and Retrieval |
| **Module 3** | **Core** | Sample Disposal |
| **Module 4** | **Optional** | Preparation of Specimens for Investigation |
| **Module 5** | **Optional** | Specimen Packaging and Transport |
| **Module 6** | **Optional** | Obtaining Venous Blood Samples |

# SECTION 4 | SPECIMEN HANDLING

## CORE MODULE 1 : Receiving Specimens

### KNOWLEDGE

- Recognise how relevant statutory, regulatory and legislative requirements and guidance for receipt of biological specimens apply within own scope of practice.
- Understand the health and safety precautions regarding the receipt of biological specimens.
- Understand the importance of correctly identifying biological specimens for direct receipt and those for referral.
- Know the different requirements for acceptance and rejection of biological specimens in accordance with standard operating procedures.
- Know how to deal with incorrectly labelled or mismatched specimens.
- Understand the importance on ensuring specimens are received and maintained in optimum conditions.
- Understand the importance of maintaining an audit trail and completing all records accurately.

### COMPETENCE

**You must be able to:**

- Work with due regard to health and safety considerations when receiving and handling biological specimens.
- Confirm that specimens accepted meet minimum requirements for further handling and processing.
- Recognise indications of damage or unsuitability of specimens that do not meet acceptable criteria or need referral elsewhere.
- Maintain specimens in optimum conditions.
- Work within scope of practice to complete all records accurately and in accordance with protocols.
- Manage workload effectively to make efficient use of resources and meet prioritisation needs of the team.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Can describe the appropriate container, any additive or special requirements for the analysis of specimens received in laboratory. | | | | |
| Correctly checks specimen details and integrity against documentation and test request. | | | | |
| Correctly identifies specimens that:<br>1) cannot be accepted<br>2) are high risk<br>3) are insufficient for testing | | | | |
| Correctly identifies specimens that are :<br>1) urgent<br>2) labile<br>3) to be referred | | | | |
| Takes appropriate action to deal with inadequate or incomplete labelling of specimens or specimen documentation. | | | | |
| Takes appropriate action to deal with leakage, spillage, breakage of specimens. | | | | |
| Takes appropriate action to deal with insufficient specimens. | | | | |
| Takes appropriate action to respond to an unexpected situation or event or one that is outside their scope of practice. | | | | |
| Maintains specimens in optimum conditions. | | | | |
| Completes documentation correctly within scope of practice. | | | | |
| Manages routine workload efficiently and can meet priority needs within scope of practice. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 1: Evidence One

Complete the table for the analysis of biological specimens received in your laboratory.

| Name of Container | Additive | Tests using this container | Special Requirements |
|---|---|---|---|
| | | | |
| | | | |
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| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Two

Provide 2 examples; one from within your department and one from another department, where you have identified a specimen which required special action to ensure it would be processed under optimal conditions.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Three

Complete the following to show you know how to deal with the situations correctly:

| |
|---|
| Specimen leaking into transport bag |
| Insufficient specimen |
| Incorrectly or inadequately labelled specimen/form |
| Specimen received with no test request |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module One to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 4 | SPECIMEN HANDLING

## CORE MODULE 2 : Storage and Retrieval

### KNOWLEDGE

- Recognise how the policies and procedures regarding storage of biological specimens apply to own scope of practice.
- Understand the health and safety precautions regarding the storage and retrieval of biological specimens.
- Know the storage and retrieval requirements of different specimens received into the department.
- Recognise the importance of selecting appropriate containers for the safe and secure storage of different types of specimens.
- Know the correct location for storage of different types of specimens in the department.
- Know what action to take if specimen integrity has been compromised due to systems failure.
- Understand the importance of maintaining an audit trail and completing all records accurately.

### COMPETENCE

**You must be able to:**

- Correctly apply local policies to the storage of biological specimens within own scope of practice.
- Follow the correct health and safety procedures when storing and retrieving biological specimens.
- Store and retrieve different specimens received into the department.
- Correctly monitor and record storage conditions.
- Respond appropriately when specimen integrity has been or is thought to have been compromised.
- Work within scope of practice to complete all records accurately and in accordance with protocols.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has outlined the retention requirements for specimens with regard to local policies and procedures. | | | | |
| Ensures unique identifier is attached to specimen and its documentation is retained in accordance with local procedures. | | | | |
| Has identified health and safety issues with regard to the storage and retrieval of specimens. | | | | |
| Stores specimens in the appropriate container, location, conditions and time period to maintain optimal conditions for the specimen. | | | | |
| Correctly retrieves specimens according to local procedures. | | | | |
| Monitors and records stored specimens within the department to meet quality and audit trail requirements. | | | | |
| Follows the procedure for reporting adverse incidents with regard to the storage of biological specimens. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 2: Evidence One

Complete the table listing 4 different specimen types, their storage requirements and length of storage used within the department. Note any special considerations that must be met to ensure correct storage at that temperature.

Think about 4 specimen types you encounter and what you do with them.

| Specimen Type | Storage Requirement | Length of Storage | Special Considerations |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Two

Briefly describe the considerations and actions you have taken to ensure that optimal conditions of specimens were maintained. Given one example of a possible consequence of not maintaining the correct conditions and what you would do.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Two to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 4 | SPECIMEN HANDLING

## CORE MODULE 3 : Sample Disposal

### KNOWLEDGE

- Know the policies regarding the disposal of biological specimens relative to scope of practice.
- Know of methods for the disposal of biological specimens and their waste products.
- Know the health and safety precautions for the disposal of biological specimens and procedures for reporting accidents, spillages and contamination involving waste products.
- Know what records must be kept for waste disposal of biological specimens and how to complete them.

### COMPETENCE

**You must be able to:**

- Correctly apply local policies to the disposal of biological specimens within scope of practice.
- Apply health and safety precautions for the disposal of biological specimens.
- Describe the different methods for the disposal of biological specimens.
- Dispose of specimens and their waste products in accordance with standard operating procedures.
- Complete records for the disposal of specimens and their waste products in accordance with local procedures.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has described the different methods of disposal of biological specimens relevant to their scope of practice. | | | | |
| Works in accordance with health and safety precautions when handling and disposing of biological specimens and waste products. | | | | |
| Correctly disposes of biological specimens according to local procedures. | | | | |
| Monitors and records the disposal of specimens according to local procedures. | | | | |
| Reports on adverse incidents regarding the disposal of specimens with reference to what happened, the action taken and what measures were put in place to avoid its recurrence. | | | | |
| Seeks advice regarding the disposal of biological specimens and waste products if required. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 3: Evidence One

Complete the table to show the different methods of disposal of biological specimens or their waste products that YOU USE in your laboratory and when to use each one.

| Method of Disposal | Example of Use |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 3: Evidence Two

Describe an adverse incident regarding the disposal of a biological specimen with reference to what happened, the action taken and what measures were put in place to avoid its recurrence.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Three to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 4 | SPECIMEN HANDLING

## OPTIONAL MODULE 4 : Preparation of Specimens for Investigation

### KNOWLEDGE

- Understand the importance of correctly identifying biological specimens for further preparation.
- Know the requirements for preparation of a biological specimen prior to one type of laboratory analysis in accordance with standard operating procedures.
- Know how to correctly use the equipment and procedures used in the preparation of the specimen relative to scope of practice.
- Know the implications of leakage, spillage, and damage to the specimens during preparation and action to take.
- Know the limits of responsibility within scope of practice.

### COMPETENCE

**You must be able to:**

- Confirm that specimen accepted meets minimum requirements for further handling and processing.
- Undertake processes for the pre-analytical preparation of a specimen for one type of analysis in line with standard operating procedures.
- Take appropriate action if the specimen is adversely affected during preparation.
- Work within scope of practice to complete all records accurately and in accordance with protocols.
- Manage workload effectively to make efficient use of resources and meet prioritisation needs.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Correctly checks specimen details and integrity against documentation and test request. | | | | |
| Can describe the appropriate container, any additive or special requirements for the preparation of a specimen for one type of analysis. | | | | |
| Performs the pre-analytical process for the specimen in preparation for analysis. | | | | |
| Places the prepared specimen in the correct environment and location for any follow-up procedure. | | | | |
| Takes appropriate action to deal with leakage, spillage, or damage to specimens during preparation. | | | | |
| Reports any factors which may influence the effective preparation of the specimens to the relevant individual. | | | | |
| Takes appropriate actions to respond to an unexpected situation or event that is outside their scope of practice. | | | | |
| Manages workload efficiently and can meet priority needs. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 4: Evidence One

Using bullet points indicate the steps you take for one example of a specimen that requires preparation prior to analysis.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 4: Evidence Two

Briefly describe an example of where the preparation of a specimen could go wrong and why it would affect the final outcome.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Four to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 4 | SPECIMEN HANDLING

## OPTIONAL MODULE 5 : Specimen Packaging and Transport

### KNOWLEDGE

- Know the local policies that apply to the transportation of biological specimens.
- Know the risks and hazards associated with the handling, storing and transporting of different biological specimens.
- Be aware of the factors that may affect the quality of the biological specimen with regard to follow-up procedures
- Know the range of packaging available for biological specimens and how to access them.
- Know the importance of maintaining documentation and records associated with specimen transportation.

### COMPETENCE

**You must be able to:**

- Confirm biological specimens are of a suitable quality for transportation.
- Prepare and despatch biological specimens in accordance with standard operating procedures when:
    - transporting within the organisation.
    - sending to external organisations.
- Ensure correct documentation is included with the specimens.
- Ensure the specimens are accessible to authorised individuals for transportation.
- Prepare and update relevant records as appropriate to scope of practice.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has listed the risks, hazards and safety precautions associated with the handling and transporting of biological specimens. | | | | |
| Has explained the differences between transporting within the department, organisation and when sending to external organisations. | | | | |
| Has described factors which may affect the quality of the specimens during transport. | | | | |
| Uses the correct labelling, packaging and transport methods for biological specimens within the department and organisation relevant to specimen type and urgency. | | | | |
| Ensures correct documentation is included with specimen prior to transport. | | | | |
| Ensure documentation and records are maintained up to date in accordance with local policy and procedures. | | | | |
| Ensures specimens for transport are placed in the correct location and in a timely manner. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 5: Evidence One

Provide examples of 3 specimens which have different transport requirements. Indicate factors which may affect the quality of the specimen, problems that may occur and any corrective action needed when dealing with their despatch and transport.

| Specimen | Transport Requirements | Factors affecting quality of specimen during transport | Problems which may occur | Possible Corrective Action |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 5: Evidence Two

Track a specimen that has specific requirements from when you receive it for despatch to the point of receipt at the external organisation, and list the various stages of the process.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Five to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 4 | SPECIMEN HANDLING

## OPTIONAL MODULE 6 : Obtaining Venous Blood Samples

### KNOWLEDGE

- Understand the local policies, protocols and good practice guidelines for obtaining venous blood samples.
- Know your own level of competence, authority and specialist knowledge base in relation to obtaining venous blood samples.
- Know the importance of obtaining positive confirmation of the individual's identity and consent before starting the procedure.
- Know the importance of applying standard precautions to obtaining venous blood samples and the potential consequences of poor practice.
- Know the factors involved in the process that could affect the quality of the blood.
- Understand the importance of maintaining accurate information and records pertaining to the specimen and investigation.
- Understand the importance of immediately reporting any issues outside of your own sphere of competence.

### COMPETENCE

**You must be able to:**

- Apply standard precautions for preventing infection and any other health and safety measures.
- Provide relevant information, support and reassurance in a manner which is sensitive to the needs and concerns of the individual.
- Select and prepare an appropriate site and use the appropriate blood collection system for obtaining venous blood in accordance with standard protocols.
- Follow the correct procedure for taking venous blood and ensuring the individual's welfare.
- Label blood samples clearly, accurately and legibly and place in appropriate packaging for transport, with request forms attached if applicable, according to local policy.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has described the importance of correctly identifying the individual and/or specimen and the need for confirming valid consent as appropriate. | | | | |
| Gives clear instructions to ensure the individual is fully prepared for the collection of venous blood. | | | | |
| Maintains the confidentiality, privacy and dignity of the individual at all times relative to the procedure. | | | | |
| Applies appropriate health and safety measures and standard precautions for preventing the spread of infection. | | | | |
| Uses the correct container for the blood sample and planned investigation. | | | | |
| Identifies and prepares the appropriate site and equipment for obtaining venous blood. | | | | |
| Obtains blood from the selected site in the correct volume and order when taking multiple samples. | | | | |
| Mixes blood and anticoagulant adequately when anti-coagulated blood is needed. | | | | |
| Removes blood collection equipment and applies dressing in accordance with standard protocols. | | | | |
| Immediately labels samples clearly, accurately and legibly, using computer prepared labels where appropriate. | | | | |
| Places samples in appropriate packaging, confirming identification details are present and where applicable, that the correct request forms are attached. | | | | |
| Places samples in the correct location for collection and transportation and at the correct temperature to maintain the integrity of the sample. | | | | |
| Ensure immediate transport of blood to relevant department when sampling or investigation is urgent. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |
| Has completed Evidence Three | | | | |

## Module 6: Evidence One

List the steps you would take in performing a routine procedure for taking a sample of venous blood. Includes specific checks you would make at each stage.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 6: Evidence Two

Produce a list of different blood collection tubes, describe their main features and identify their purpose.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 6: Evidence Three

Identify some common adverse reactions or events that could occur during blood sampling. How would you recognise them and what actions would you take if they occurred.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Six to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

IBMS Institute of Biomedical Science



BIOMEDICAL SCIENCE SUPPORT STAFF

# CERTIFICATE OF ACHIEVEMENT PART I

## SECTION 5 | PERFORMING STANDARD TESTS

**Module 1** **Optional** Simple Manual Method or Commercial Kit

**Module 2** **Optional** Use of an Automated Analyser

# SECTION 5 | PERFORMING STANDARD TESTS

## OPTIONAL MODULE 1 : Simple Manual Method or Commercial Kit

### KNOWLEDGE

- Understand the importance of accountability, reporting and referral structures for laboratory investigations and how to seek advice or assistance.
- Understand the importance of maintaining the link between the specimen and documentation.
- Know how and when to use the manual method or commercial kit.
- Know factors which may influence the quality of the sample and their significance.
- Understand the importance of urgent samples.
- Know the method of sample preparation prior to investigation.
- Understand importance of following the procedures.
- Know how to complete any documentation related to the procedure.

### COMPETENCE

**You must be able to:**

- Check specimens/samples are suitable for investigation by the chosen method.
- Perform analysis according to standard operating procedures.
- Follow the correct health and safety procedures.
- Confirm that analysis has been successful.
- Identify when investigation has not been successful and take action within scope of practice.
- Record results in accordance with the standard operating procedure.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Checks they have read and understood the procedure for performing the test prior to commencement. | | | | |
| Has shown they understand how errors may occur whilst using the method or commercial kit. | | | | |
| Checks sample to ensure it is suitable for investigation n accordance with policy and procedures. | | | | |
| Takes action if there is a problem with the identity of the specimen and/or if is not suitable for investigation. | | | | |
| Performs quality control in accordance with the requirements of the standard operating procedure. | | | | |
| Performs basic troubleshooting of any discrepancies under direction and supervision of a qualified person if outside of scope of practice. | | | | |
| Performs the investigation to agreed turnaround times and identifies priority specimens. | | | | |
| Identifies and processes samples that may need re-investigation and/or referral. | | | | |
| Seeks advice if test results are outside of acceptable limits. | | | | |
| Completes laboratory records to agreed protocols and standards. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 1: Evidence One

Complete the following table for your selected method or kit.

| |
|---|
| Name of Method or Kit |
| Sample type / Preparation |
| List the key stages of the investigation. |
| Health and Safety Considerations |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 1: Evidence Two

Reflect on an error that has occurred whilst using your chosen manual method or commercial kit. Explain what action you took and what you would do differently in the future.



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module One to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

# SECTION 5 | PERFORMING STANDARD TESTS

## OPTIONAL MODULE 2 : Use of an Automated Analyser

### KNOWLEDGE

- Understand the importance of accountability, reporting and referral structures for using an automated analyser and how to seek advice or assistance.
- Understand the current local policies and standard operating procedures and good practice guidelines for using an automated analyser.
- Understand the health and safety precautions to follow when using an automated analyser.
- Know how and when to use an automated analyser.
- Be aware of the importance of calibration for standard tests on an automated analyser.
- Know the purpose of quality control for standard tests on an automated analyser.
- Know the procedure for monitoring and replenishing stocks of consumables used on the automated analyser.

### COMPETENCE

**You must be able to:**

- Follow standard operating procedures related to using an automated analyser.
- Follow the correct health and safety procedures when using an automated analyser.
- Perform standard maintenance on automated analysers, including quality control checks.
- Confirm the suitability of samples for analysis using an automated analyser.
- Process standard tests using an automated analyser.
- Identify any problem that may affect sampling on an automated analyser.
- Monitor and replenish stocks of consumables used on the automated analyser.
- Complete documentation in accordance with local procedures.

| Evidence of Achievement | | | | |
|---|---|---|---|---|
| **Performance Indicators** | **Trainee** | | **Trainer** | |
| | **Date** | **Signed** | **Date** | **Signed** |
| Has read and understood the standard operating procedures and good practice guidelines for chosen automated analyser. | | | | |
| Knows the importance of calibration and quality checks for standard tests on an automated analyser. | | | | |
| Can describe the tests performed on a chosen analyser within scope of practice and any health & safety issues that must be considered. | | | | |
| Works within the limits of practice and responsibility using an automated analyser and seeks advice when exceeded. | | | | |
| Can identify urgent samples and process them accordingly. | | | | |
| Checks samples are correctly identified before processing and that their quality has not been compromised. | | | | |
| Performs standard maintenance of automated analyser, including quality checks prior to testing. | | | | |
| Correctly prepares samples prior to testing if applicable. | | | | |
| Correctly stores QC material following standard operating procedures. | | | | |
| Performs standard testing on automated analysers following standard operating procedures. | | | | |
| Identifies when the analyser has not 'sampled' a specimen correctly. | | | | |
| Can retrieve specimens that may require reruns or further processing. | | | | |
| Updates records following standard operating procedures. | | | | |
| Correctly stores and disposes of specimens according to policies and procedures. | | | | |
| Monitors available consumables and replenishes stock according to protocol. | | | | |
| Has completed Evidence One | | | | |
| Has completed Evidence Two | | | | |

## Module 2: Evidence One

Bullet point the sequence of checks from start to finish you must make prior to processing a sample.

Summarise what action to take if there is a problem at each stage.

You don't need specialist knowledge to complete this.

| Sequence of Checks | Action if problem identified |
|---|---|
| | |

| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

## Module 2: Evidence Two

Reflect on the limits of your practice and responsibility using an automated analyser.

How far can you go before you need to hand over to a colleague?
Why is it important to recognise this?



| | | | |
|---|---|---|---|
| Trainee Signature | | Date | |
| Trainer Signature | | Date | |

**Line Manager's comments:**



**Declaration:**

I declare that the trainee has completed Module Two to the necessary standard to demonstrate competence in this area of their practice.

All requested pieces of evidence have been completed and checked by the training officer.

| | | | |
|---|---|---|---|
| Laboratory Manager | | Date | |
| Signature | | | |

## DECLARATION OF COMPLETION OF IBMS TRAINING PORTFOLIO FOR THE CERTIFICATE OF ACHIEVEMENT PART I AND PROPOSAL FOR AWARD

### Candidate Details

| | | | |
|---|---|---|---|
| Surname: | | Title: | |
| Forename(s): | | | |
| Date of Birth: | | IBMS Number: | |
| Telephone No: | | | |
| E-mail Address: | | | |
| Home Address: | | | |
| | | | |

### Laboratory Details

| | | | |
|---|---|---|---|
| Department: | | | |
| CPA Ref (if applicable): | | | |
| Organisation Name: | | | |
| Hospital Name: | | | |
| Laboratory Address: | | | |
| | | Postcode: | |

### Training Officer Contact Details*

* The Institute defines a training officer for the purposes of completing the portfolio, as the individual whose responsibility it is to ensure that the delivery of training, assessment of competence, and verification of knowledge and skill against each individual statement is signed off.

| | | | |
|---|---|---|---|
| Surname: | | Title: | |
| Forename(s): | | HCPC No: | |
| IBMS No: | | Telephone No: | |
| Email Address: | | | |

## Laboratory Manager Contact Details

| | | | |
|---|---|---|---|
| Surname: | | Title: | |
| Forename(s): | | HCPC No: | |
| IBMS No: | | Telephone No: | |
| Email Address: | | | |

## Module Selection

Please select which Optional modules have been completed. (NB a minimum of 2 must be completed)

| | |
|---|---|
| Health and Safety | |
| Waste Management | ☐ |
| Quality | |
| Preparing Stock Solutions | ☐ |
| Routine Maintenance of Laboratory Equipment | ☐ |
| Specimen Handling | |
| Preparation of Specimens for Investigation | ☐ |
| Specimen Packaging and Transport | ☐ |
| Obtaining Venous Blood Samples | ☐ |
| Performing Standard Tests | |
| Simple Manual Method or Commercial Kit | ☐ |
| Use of Automated Analyser | ☐ |

## Laboratory Manager Declaration

The Declaration **must** be signed by the Laboratory Manager as detailed above.

I declare that the aforementioned candidate has completed the IBMS training portfolio for the Certificate of Achievement Part I.

All necessary modules and evidence sections have been completed.

The Candidate works in accordance with the IBMS Code of Conduct.

The candidate has demonstrated the necessary knowledge and competence to recommend the award of this qualification.

| | |
|---|---|
| Full Name | |
| Signature | |
| Date | |

## Candidate Declaration

The Declaration **must** be signed by the Candidate as detailed above.

I have completed the IBMS training portfolio for the Certificate of Achievement Part I.

All necessary modules and evidence sections have been completed.

I work in accordance with the IBMS Code of Conduct.

I have demonstrated the necessary knowledge and competence for the award of this qualification.

| | |
|---|---|
| Full Name | |
| Signature | |
| Date | |



**Institute of Biomedical Science**
12 Coldbath Square
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**e:** registration@ibms.org
**w:** www.ibms.org
www.ibms.org/followus

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