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Personal Details
Name:
IBMS Membership Number:
IBMS Membership Grade:
HCPC Registration Number:
Date of HCPC Registration:
Employment Address:
Telephone Number:
Date Specialist Training Commenced:
Name of Training Officer:

Confirm on of Conpleted 1.	ng
Date Training Completed Training cer's Sign. ure	Candidate's Signature

Per imer	ndatio for Award of Specialis	st Diploma
Ce of Externa. Examination	External Examiner's Signature	External Examiner's Name

#### **Training Review**

A training review should occur on a monthly basis between the trainee and training officer. These will provide an opportunity for feedback, set targets, agreed deadlines and monitor progress.

Reviewed by	Date	Comments
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#### 1. INTRODUCTION

- 1.1. In order for you to be awarded an Institute Specialist Diploma you must be a current member of the Institute since the time you were issued with the portfolio. You must have held corporate membership for at least one year and be a current member at the time of the examination.
- 1.2. The Institute of Biomedical Science (Institute/IBMS) Specialist Portfolio protues the opportunity for you to gain recognition that you have finished a progrative structured, standardised post-registration training. This requires you complet the IBMS Record of Training for the Specialist Diploma (Specialist Fitfolio), submit portfolio of evidence for assessment and undertake an oralle, mination of your specialist knowledge and understanding in your chosen field in orall to be awared the Institute's Specialist Diploma.
- 1.3. Holding a Specialist Diploma demonstrates that y the land a issed against a benchmark standard for a specialist practitioner in you chosen used by your employer to demonstrate pecialist knowledge and skills linked to career and pay progression.
- 1.4. The Specialist Portfolio is configured to be a provinty of the individual as it represents a commitment by the emptyer for pressional development specific to them. It is not 'owned' by the lateral laboratory and you will to contine with a partially completed portfolio, it is at the discretion of your two employer where or not they wish to continue with the same portfolio or restart to the lateral l
- 1.5. To support condiction of this Specialist Portfolio a separate guidance document has seen produced to titute of Biomedical Science Specialist Portfolio Guidance for the condiction of the condition of th
- It is strongly recommended that you and your training officer/mentor read and understand this document. Failure to do so could jeopardise your chances of success. External examiners for the portfolio are required to read and understand it as part of their responsibility as a representative of the Institute.

- 1.7. A discipline specific portfolio reflects the range of analyses that are considered to be relevant to your specialty. All sections must be completed in order to express your ability to operate at the specialist level. Completion of the sections should follow the formal training programme that is submitted by your laboratory to the IBMS as part of the laboratory training approval process.
- 1.8. The IBMS Specialist Portfolio can only be completed in laboratories which hole approval for post-registration training.
- 1.9. The following sections highlight some key points **but are not a substitute** of get the information contained in the *Institute of Biomedical Science* pecialist Portfor Guidance for Candidates, Training Officers and External Examiners

#### 2. TRAINING

- 2.1. As a requirement for IBMS approval of your labora. Vio. ing, i must have an indicative training programme which sets our the sect. Is of the laboratory they will rotate through, the expected duration in tach area, the indule(s) that are covered and how training is assessed.
- 2.2. In-service training and assessment at demonstrate and scientific practice based on the knowledge and consistence—the state modules in order to meet the requirements of the external arm and cocess. Each module requires you to demonstrate knowle se and completence elements specific to an investigation or task. It is the respectful sibility of the training outcomes which have been subdivided into three areas.

#### Knowledge 1 derstanding

A successful adidate you will be able to:

- b. Demonstrate knowledge and understanding of the scientific basis of the laboratory tests and the disease process under investigation.
- c. Show an awareness of current issues and developments within healthcare and biomedical science.

These are evidenced by in-house assessments of training and examination of knowledge during the *viva voce* with the external examiner to assess the ability of the candidate to describe/discuss these aspects of their work.

#### **Professional skills**

As a successful candidate you will be able to:

- a. Competently perform a range of laboratory tests without immediate survision.
- b. Demonstrate self-direction in solving problems and exercising problems and exercising problems are exercising problems.
- c. Demonstrate a systematic application of profesional sowledge id understanding in the interpretation of laboratory data to termin. Stort used on best practice.

These are evidenced by the in-house ass sments of training and portfolio of evidence.

#### Transferable skills

As a successful candidate you will he to:

- a. Demonstrate communica in skills within the hearthcare environment and as part of the laboratory terms. This is wenced in presentation.
- b. Demonstrate t. ability \* critically flect in order to inform best practice. This is evidenced y pers eflective statements.
- 2.3. Where y do not ave action a particular technique, knowledge must still be demonstrate the ether with an understanding of the key skills required to perform the test. There have also be other tests your laboratory includes within its basic include recertoire in hich you are additionally required to be competent. These can be assed and then recorded in the reflective practice statement at the end of each sub-scion.
- Institute recommends that you have a regular review of your training (e.g. on a monthly basis) with your training officer in order to monitor your progress. These sessions will provide an opportunity for you to receive feedback on how your training and completion of your portfolio is progressing against the structured departmental training programme you will be following, which is a requirement for IBMS training laboratory approval). It is a time to take into consideration issues that have impacted

on your training, and whether additional support is required or available. Targets to complete stages of your training can be set and deadlines for meeting them, agreed.

#### 3. EVIDENCE

- 3.1. Evidence is generated through the internal assessment of your training and can be from a variety of sources (see section 5.11 in the guidance document for some examples). Many pieces of evidence will be generated and you will need to select those most suitable for the Specialist Portfolio module. Your training officer to be asked to check these are appropriate and confirm meet the requeements on the standards for external examination.
- 3.2. Evidence must be filed in a single specialist portfolio of evidence.
- 3.3. In addition to evidence of answering questions the train only ONE other example of evidence is required for the **Evidence** Acrie ction. This is chosen by you as an example of evidence at demorates your knowledge and competence in performing a particular to inique.
- 3.4. You are required to justify your change of evictories in a relective practice statement at the end of every module.
- 3.5. Evidence must be sufficient to table an a symmed judgement by the external examiner on whether the standard are the standard are the standard and skills for the module has been met.
  - The amor cof evidence n. 'nor exceed the requirement for evidence stipulated in the evidence of acressing the evidence of
- 3.6. For notion of the lence will be externally assessed as part of examining your such at the award of an IBMS Specialist Diploma. It is very important that it is well to inisect and an index for the evidence is provided.

#### LETING THE RECORD OF LABORATORY TRAINING

4.1. Once you have completed your training for a particular module it must be signed off by the trainer to confirm that the knowledge and competence requirements and the Evidence of Achievement sections have been met.

- 4.2. You are required to complete a reflective practice statement at the end of each module to justify your selection of evidence.
- 4.3. All sections of your record of training for the Specialist Portfolio must be completed and signed off by the trainer, and your portfolio of supporting evidence checked, to confirm your suitability for the specialist examination.

#### 5. END-POINT ASSESSMENT

- 5.1. On completion of training and in accordance with the requirement of the Special to Diploma, your employer should apply to the Institute for the prointment of a visiting external examiner.
- 5.2. Accompanying the portfolio should be a signed statement from the latery manager testifying to the range of laboratory in the laborato
- 5.3. The external examiner will do armine our suitation or the award of the Specialist Diploma by assessing your knowledge of inderstanding of your specialty through: the oral presentation one evide of training you have provided and questions asked during the lateratory tour.
- 5.4. Your preserctions show not be correcomplicated and slides should be kept simple: they are ally a prompt to live our talk a structure. You are talking about things you know. The same your experience, key aspects of your work, recent drestopments at may have occurred, or are planned and any particular interests ou have The extended and examiner may also wish to ask some questions related to the page acion or seek points of clarification.
- Your pute for of evidence will provide the examiner with an opportunity to assess quality of your training (e.g. through the questions asked by the trainer) and your under anding of the techniques (e.g. annotated evidence, witness statements, reflective statements).
- 5.6. During the laboratory tour with *viva voce* the external examiner will not assess your practical competence; this was the responsibility of your trainer. However, they will expect you to be able to demonstrate knowledge and understanding of the practical

aspects underpinning a techniques and corrective action you might take if things go wrong.

It is reasonable for the examiner to ask questions on any aspect covered in the portfolio. A theoretical knowledge is required as a minimum on tests performed outside of the department. Questions may include references to equipment in use, samples that are being processed, investigative techniques being performed, or lity control, results and health and safety.

5.7. After this you will be informed of the outcome (Pass or Fail) and verbal feedboard be provided by the examiner. If you have not been successful the examiner provide more detailed written feedback explaining the reason(strong for this outcome and providing guidance on how to address them. This will be recorded in the examiner's report. A timeline will be agreed by the canoute, training officer and examiner to address any shortfalls. A subsequent full or part, examinately will be required and this must be arranged through the IB'

#### 6. COMPLETION OF REPORTS AND AW 10

- 6.1. Check with your trainer that they have su is ad the feedback report form to the Institute. Both the external extended and to laborating trainer are required to submit reports, and delays is this part of the process will delay the award of your Specialist Diploma.
- 6.2. Once the reports have been received a Institute will issue your Specialist Diploma. If you are currently wither ass of Licentiate you will be eligible to apply to upgrade your membership to be the a Mercuer. Upgrading to the next level of membership is not at matic and you are related to make an application to the Institute as soon as possible to are to access the Institute's higher level qualifications to assist you in framering your reer.



# Section 7. Haema nuggy

This section covers the rar z of procures and magnostic techniques that have been identified as being most we evant to praction as a specialist biomedical scientist working in haematology. If part on the service there is an option in hospital transfusion practice. Candidates completing these expected to be able to demonstrate the application of knowledge and that defined in a tion 2 this portfolio.

It is accepted the some e of these tests may not be performed in the candidate's own laborathy. Whilst puritical skills may not be achievable (for example through secondment to another laboratory) with level of someone performing them regularly, knowledge and under and of its application is still required and may be examined.

re may oth tests, outside of those listed in this portfolio, that are part of the training laboratory's basic repertoire in which the individual is required to be competent. The recorded in the reflective statement at the end of each sub-section

### Section 7.1 Primary Investigations of Blood and its Components Subsection 7.1a Cell counting and haemoglobin concentration measurement

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles and practice of the automated cell counting/concentration methods.
  - Leucocytes
  - Erythrocytes (RBCs)
  - Platelets
  - Reticulocytes
  - Nucleated RBCs
  - White cell differentials
  - RBC parameters
  - Haemoglobin
- 2. The use of calibration and control materia and how to deal with out of limit values.
- 3. Correct preparation of samples for testing an arranalytical factors that could affect accuracy of the results.
- 4. Effects of haemolysis, lipaemia cerus, crothron e-analytical variables and storage conditions on laborator, esultr
- 5. The use of reference values and the inificance coabnormal results.
- 6. Limitations of tests 2 further investiguished ions that may be required.
- 7. Internal quality control and reversely assessment procedures.

#### COMPETE L'CE

#### Be a<sup>1</sup> to:

- a. Che e suitability of sample quality for analysis.
- Match patient unique identification and confirm urgency of analysis.
- c. Prepare an experate named automated analysers for routine use.
- c' analysis in accordance with standard laboratory procedure.

  Critically evaluate results and understand the process of auto-validation, delta hecks, reference ranges and conditional ranges.
- f. Complete all relevant documentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on howleds and skill
components required to complete this module. (Evidence of support of this required).
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#### Subsection 7.1b Erythrocyte sedimentation rate (ESR)/plasma viscosity

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles and purpose of ESR measurement and environmental effects on the accuracy of results.
- 2. Principles and purpose of measurement of plasma viscosity.
- 3. Relevance of these measurements in the diagnosis and monitoring disease.
- 4. Urgent scenarios in which ESR measurement is important.
- 5. Principles of instrumentation used for ESR and plasma viscosity asure.
- 6. Reference values and the significance of abnormal regions
- 7. Internal quality control and external quality assessme. Proces

#### COMPETENCE

- a. Prepare and operate named authrated ars for routine use.
- b. Prepare samples for me sal ESR tectique if memod is used locally.
- c. Perform named test in accordance with tandard laboratory procedure.
- d. Identify abnormal reschange an likely significance to clinical detail.
- e. Complete dor \_nentation accordar 2 with quality control and audit requirements.

Candidate has been assessed by the trainer to work in laboratory procedures. (No other evidence is required)	
Date of completion:	
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## Section 7.1 Primary Investigations of Blood and its Components Subsection 7.1c Identification and enumeration of peripheral blood cells by microscopy

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding the following:

- 1. Principles and application of light microscopy.
- 2. Principles and practice of staining blood cells by Romanowsky staini .
- 3. Use of slidemaker/stainers.
- 4. Pre-analytical variables that will affect the appearance of blc 1 cells.
- 5. Mechanisms of normal haemopoiesis.
- 6. Recognition of normal and abnormal red cell morphology, their real conships to red cell indices and clinical significance.
- 7. Normal morphological features of the myeloid and lympa in series of write blood cells.
- 8. Significance of abnormal or immature white lood also on the pripheral blood film and their significance.
- 9. Key features of blasts and signs *r* aysp. ia.
- 10. Abnormal platelet morpholog, and numbers on the purpheral blood film and their significance.
- 11. Normal reference value and the sign rance of abnormal results.
- 12. Internal quality con. 'and ey' rnal qua. assurance procedures, including digital or standard NF' \S sch.

#### **COMPETENCE**

- a. Prepare and stain blood films of suitable quality for morphological analysis.
- b. Set up a microscope for viewing blood films.
- c. Accurately identify morphological features of normal and abnormal cells.
- d. Perform tests in accordance with standard laboratory procedures.
- e. Manually enumerate WBC differential counts.
- f. Estimate the platelet count from the blood film and confirm accuracy of count.
- g. Assess platelet clumping and adhesion to neutrophils.
- h. Identify possible abnormalities and likely significance to clinical deta
- i. Refer samples for further testing according to abnormalities.
- j. Complete documentation in accordance with quality assurance a. audit requirements.



Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
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Candidate has answered questions set by the trainer on howleds and skill
components required to complete this module. (Evidence of support of this required).
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#### **Subsection 7.1d** Infectious mononucleosis

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. The principles and practice of the screening test for infectious mononucleosis
- 2. Blood count, serological and morphological features of infectious mor
- 3. Limitations of IM screening tests.
- 4. Differential diagnosis if a patient presents with signs of IM but scree ng gives a negative result.
- 5. Internal quality control and external quality assessment procedures.

#### **COMPETENCE**

- a. Perform tests in accordance with standard lakery procedure.
- b. Clearly distinguish between posit; , ... tive an quive a results.
- c. Complete documentation in a prdance ith quality atrol and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).	
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Subsection 7.1e Screening test for sickle cell haemoglobin (HbS)

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Principles and practice of the screening test for sickle cell haemoglobin (HbS).
- 2. Limitations of HbS screening tests.
- 3. Internal quality control and external quality assessment procedures

#### **COMPETENCE**

- a. Prepare samples and perform tests in accordant with sondard laborably procedure.
- b. Clearly distinguish between positive, nega and e vivocal re 'ts.
- c. Complete documentation in accordance with cy control and audit requirements.
- d. Describe local clinical procedures vup po. ve or egative results.

Candidate has been assessed by the trainer to work in accordan laboratory procedures. (No other evidence is required).	te with standard
Date of completion:	
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#### Subsection 7.1f Bloodborne parasites

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Geographical occurrence of malaria.
- 2. Risk assessment protocol for viral haemorrhagic fever (VHF) assessmen ... or to malaria request.
- 3. Techniques for detecting the presence of human malaria parasites, cluding:
  - Thick and thin blood films
  - Use of different stains
  - Immunochromatography
  - Awareness of other tests (e.g. PCR, QBC)
- 4. Presenting clinical symptoms of suspected case and he hatological ges.
- 5. Different types of malaria parasites.
- 6. The life cycle of malarial parasites and the ages found in the 'ood.
- 7. The effect of drug treatment on detection.
- 8. The limitations of techniques employed.
- 9. Internal quality control and exter angue by assess ant according to
- 10. Other bloodborne parasites ( pesia, Ti panosomo, uria, Leishmania.

#### **COMPETENCE**

- a. Prepare say les and erform sin accordance with standard laboratory proce ure.
- b. Clarly distinguis. Atween positive, negative and equivocal results.
- c. mplete ocument on in accordance with quality assurance and audit recore ents.
- Descripthe local linical procedures to follow up positive or negative results.
- e. Recognis na' lal parasites on blood films.
- f. Estimate mearia parasitaemia, knowing when this should be undertaken, and its significance.
  - Recognise other bloodborne parasites on blood films.

Date of completion:  Trainer's name:  Trainer's signature:  Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence to sure this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evidence chosen by the trainer on this area.  Date of completion:  Trainer's name.  Trainer's name.  Trainer's name.  Trainer's signature:  In eval Assessor's signature:  In eval Assessor's name:  Date:	Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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#### Subsection 7.1g Coagulation screening

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Components of the <u>in vivo</u> and <u>in vitro</u> haemostatic pathways and their modes action.
- 2. Principles and practice of techniques for measuring prothrombin (PT and which clotting factors are involved.
- 3. Principles and practice of the techniques for measuring activated path thromboplastin time (APTT) and which clotting factors are in the ved.
- 4. Principles of instrumentation used to assess haemostasis function
- 5. Pre-analytical variables that can affect results.
- 6. Normal reference values and the significance of abnumance
- 7. The relationship between abnormal PT and APT and our laborator, sts (e.g. full blood count and liver function tests).
- 8. Principles and practice of the techniques measuring throm time (TT) and reptilase time (RT).
- 9. Effects of anticoagulant therapy on PT APTT and T measurement.
- 10. Internal quality control and extend query assess introcedures.

#### **COMPETENCE**

- a. Check the sability a sample ality for analysis.
- b. Mate sample patient unique identification and confirm urgency of analysis.
- c. Masure prothro. in time (PT) and activated partial thromboplastin time (APTT) in cordance with state and laboratory procedure.
- d. Cri evaluate results.

  Identi amples at may require further investigations.
- f. Complex 'or mentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordance laboratory procedures. (No other evidence is required).	ance with standard
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#### Subsection 7.1h Fibrinogen

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Components of the <u>in vivo</u> and <u>in vitro</u> haemostatic pathways and their modes action
- 2. Laboratory investigation and clinical emergency of suspected dissert ated intravascular coagulation (DIC).
- 3. Principles and practice of fibrinogen estimation.
- 4. How to distinguish between afibrinogenemia, hypofibrinogenemia and dysfibrinogenemia.
- 5. Principles of instrumentation used to estimate fibring
- 6. Pre-analytical variables that can affect results.
- 7. Normal reference values and the significance of bnorn, results.
- 8. Internal quality control and external quality sessment produces.

#### **COMPETENCE**

- a. Check the suitability of ample qualit for analysis.
- b. Match samples to pent unique idention tion and confirm urgency of analysis.
- c. Prepare assay reagen, nd introls for use.
- d. Prepare and carate nan automated analysers for use.
- e. Prepare ar check controls with acceptable limit.
- f. Perform an is in cordance in standard laboratory procedures.
- g. Iden' y proble and may affect result and take remedial action.
- h. Id itify samples to the may require further investigations.
- i. mplete ocument on in accordance with quality assurance and audit requested.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
Date of completion:
Trainer's name:
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One other piece of eviden chosen by candidate as an example of their
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#### Subsection 7.1i Fibrin degradation products

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Components of the <u>in vivo</u> and <u>in vitro</u> haemostatic pathways and their modes action.
- 2. Principles and practice of D-dimer estimation.
- 3. Principles of the instrumentation and manual method used to detection degradation products.
- 4. Pre-analytical variables and interacting substances that can a ct resu
- 5. Normal reference values and the significance of abnormal result
- 6. Use of D-dimer for the investigation of suspected case of venous thromboembolism.
- 7. Internal quality control and external quality as sment needures.

#### **COMPETENCE**

- a. Check the suitability of sample query or and
- b. Match samples to patir cunique ide 'fication and confirm urgency of analysis.
- c. Perform analysis in ordance with stall and laboratory procedures.
- d. Identify problems that ay ect result, and take remedial action.
- e. Identify samp' that ma, 'quire fur' er investigations or action.
- f. Complete ' cumentation in 'cor' ace with quality assurance and audit requiremen.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
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components required to complete this module. (Evidence in Surprise required).
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Trainer's name.
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is is to c firm the the knowledge and competence requirements for this section and the equirement of the Evidence of Achievement section have been met.
ternal ternal sor's signature:
Internal Assessor's name:
Date:

#### Subsection 7.1j Anticoagulant therapy

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles of heparin and vitamin K antagonist (VKA) therapy.
- 2. Principles and practice of monitoring anticoagulant therapy with unfractuated heparin (UFH), low molecular weight heparin and related anticoagulates (e.g. danaparoid, fondaparinux).
- 3. Principles and practice of the international normalised ratio (INR) symmetry monitoring VKA therapy.
- 4. Principles of instrumentation used to determine INR.
- 5. Pre-analytical variables that can affect results.
- 6. Therapeutic ranges and significance of out of range in this.
- 7. Principles, practice and limitations of assessing frect the mbin inhibition (DTI) and direct factor Xa inhibitor (DFXaI) therapy with outline coagnition screening tests and specific assays for DTI and DFXaI.
- 8. Internal quality control and external quality control and external quality explicitly explicitly as the second of the second

#### **COMPETENCE**

- a. Check the suitability amp' quality for halysis.
- b. Match sample 3 patier lique identification and confirm urgency of analysis.
- c. Prepare tes eagents and c trols ( use.
- d. Prepare an erform JR in ac Jance with standard laboratory procedures.
- e. Prep and p APTT in accordance with standard laboratory procedures.
- f. Pr are and perion anti-Xa assays for LMWH and related anticoagulants, UFH and Xals in a cordance with standard laboratory procedure.
- g. Presend check concrols are within acceptable limit.
- Ident problem hat may affect results and take corrective action.
- i. 'dentify np' that may require further investigations or action.
- j. Complete a sumentation in accordance with quality assurance and audit ments.

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#### **Section 7.1 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and Core Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere the evidence contained in the portfolio. This may lead to further discus and during viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

#### Section 7.1 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

#### Section 7.2 Iron Deficiency Anaemia and Iron Overload

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Normal erythropoiesis and production of haemoglobin.
- 2. Normal iron metabolism and storage.
- 3. The effect of iron deficiency on red cell indices, including reticulocyte requireters and red cell morphology.
- 4. The effect of iron overload on red cell indices.
- 5. Clinical causes of iron deficiency, functional iron deficiency and iron arload.
- 6. Laboratory tests available to assess iron status (e.g. serum fer in, ser transferr serum iron, zinc protoporphyrin).
- 7. Pre-analytical variables that can affect results.
- 8. Normal reference values and the significance of abno. Alres.
- 9. Internal quality control and external quality as sment, cedures.

#### **COMPETENCE**

- a. Check the suitability of sample que or anal,
- b. Match samples to pating unique ide. Greation and confirm urgency of analysis.
- c. Perform named tec ques in cordanc vith standard laboratory procedures.
- d. Identify problems that an ect result and take corrective action.
- e. Identify same s that may quire fur er investigations or action.
- f. Complete cumentation in for ance with quality assurance and audit requirement

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
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Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
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## **Section 7.2 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere the evidence contained in the portfolio. This may lead to further discus and during viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

# Section 7.2 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this segment.



# Section 7.3 Haemolytic Anaemia

**Subsection 7.3a** Screening tests

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Causes of hereditary and acquired haemolytic anaemia.
- 2. Peripheral blood morphological features (intravascular and extravascular association) with haemolytic anaemia.
- 3. Principles of screening tests to identify the occurrence of haemolysi including:
  - Reticulocyte count
  - Serum haptoglobin
  - Haemosiderin
  - Methaemoglobin
- 4. Normal reference values and the significance of bnorn 'results.
- 5. Internal quality control and external quality cessment podures.

#### **COMPETENCE**

- a. Check the suitability of Inple quant for analysis.
- b. Match samples to preent unique identalation and confirm urgency of analysis.
- c. Perform named tech, vies is accordance with standard laboratory procedures.
- d. Identify proble is that it affect the result and take corrective action.
- e. Identify sar les that may les vire for one investigations or action.
- f. Complete coument on in a country assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordan laboratory procedures. (No other evidence is required).	te with standard
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# Section 7.3 Haemolytic Anaemia

Subsection 7.3b Inherited and acquired haemolytic anaemia

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Causes of hereditary and acquired haemolytic anaemia.
- 2. Blood morphological features associated with haemolytic anaemia.
- 3. Metabolic pathways in red cells (e.g. glycolytic).
- 4. Key aspects of the glycolytic pathway.
- 5. Principles and limitations of techniques to identify membrane abnoralities (e.g. flow cytometry).
- Principles and limitations of techniques to identify enzyme deficencies (ed.) e 6-phosphate dehydrogenase [G-6-PD]).
- 7. Principles and limitations of techniques to identify active anaemia (e.g. direct antiglobulin test [DAT], prognate on a ld or warm acting antibodies).
- 8. Principles and limitations of techniques to entify a juired no immune haemolytic anaemia (e.g. paroxysmal nocturnal haemoly in the [PNH], maiaria).
- 9. Normal reference values and the significance of informal roults.
- 10. Internal quality control and extend query assess into ocedures.

## **COMPETENCE**

- a. Check the cability of sam, que y for analysis.
- b. Match sam, stop lent uniq identification and confirm urgency of analysis.
- c. Perform name anniques in accordance with standard laboratory procedures.
- d. Id stify problems at may affect the result and take corrective action.
- e. Intify samples that any require further investigations or action.
- f. Co. Ir 2 documentation in accordance with quality assurance and audit requirements.

Date of completion:  Trainer's name:  Trainer's signature:  Candidate has answered questions set by the trainer on the knowledge and skill components required to complete this module. (Evidence to some this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evident chosen by the candidate as an example of their competence in this area.  Date of completion:  Trainer's name:
Candidate has answered questions set by the trainer on the knowled and skill components required to complete this module. (Evidence to surple this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evident chosen by the candidate as an example of their competence in this area.  Date of completion
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## **Section 7.3 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

# Section 7.3 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this see ....



# Section 7.4 Abnormal Haemoglobins and Thalassaemia

Subsection 7.4a Haemoglobin variants (e.g. HbS, C, D, E)

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding the following:

- 1. Normal structure of the haemoglobin molecule.
- 2. Structural variants leading to haemoglobin abnormalities (e.g. HbS).
- 3. Combined defects (e.g. HbSC, HbS/thalassaemia).
- 4. Red cell indices and blood morphological features associated with a armal haemoglobin variants.
- 5. Principles, practice and limitations of current techniques (high-pormaic chromatography [HPLC], capillary electrophoresis, iso loctric focus mass spectrometry) for the detection and investigation of local limitations of current techniques (high-pormaic formaic chromatography [HPLC], capillary electrophoresis, iso loctric focus mass spectrometry) for the detection and investigation of local limitations of current techniques (high-pormaic formaic chromatography [HPLC], capillary electrophoresis, iso loctric focus mass spectrometry) for the detection and investigation of local limitations of current techniques (high-pormaic formaic chromatography [HPLC], capillary electrophoresis, iso loctric focus mass spectrometry) for the detection and investigation of local limitations of li
- 6. Reference values and the significance of abr mal results.
- 7. Internal quality control and external quali assessment procees.

#### **COMPETENCE**

- a. Check the suitability sample quality analysis.
- b. Match samples to pat. tur que identification and confirm urgency of analysis.
- c. Perform name technique for the defection of abnormal haemoglobin variants in accordance with standard la rate procedures and interpret results.
- d. Identify pro ms the may affect the result and take corrective action.
- e. Iden' / sample at may require further investigations or action.
- f. Coplete docum ration in accordance with quality assurance and audit ruirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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Candidate has answered questions set by the trainer on howleds and skill
components required to complete this module. (Evidence of Support
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# Section 7.4 Abnormal Haemoglobins and Thalassaemia

Subsection 7.4b Imbalanced globin chain production

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Normal structure of the haemoglobin molecules.
- 2. Imbalanced globin chain production leading to the thalassaemias.
- 3. Globin chain composition of severe and trait forms of alpha and bet halassaemias, HbH and HbBarts.
- 4. Combined defects (e.g. HbSC, HbS/thalassaemia).
- 5. Red cell indices and blood morphological features associated "th the lassaemi"
- Structural difference and significance between severe and trait in most thalassaemias.
- 7. Principles and practice of relevant techniques for the techniques for the imbalanced globin chain production.
- 8. Reference values and the significance of ab mal results.
- 9. Internal quality control and external quality ssessment procedures.

#### **COMPETENCE**

- a. Check the suitability o. m 2 quality for analysis.
- b. Match sample to patient rique ider ification and confirm urgency of analysis.
- c. Perform noticed techniques to the letection and quantification of abnormal haemoglobic due to imbalance in globin chain production in accordance with standard laboratory procedures.
- d. It' intify problems in the may affect the result and take corrective action.
- e. Intify staples that any require further investigations or action.
- f. Con ' e documentation in accordance with quality assurance and audit requirements.

Date of completion:  Trainer's name:  Candidate has answered questions set by the trainer on thousand skill components required to complete this module. (Evidence to sure this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evidence chosen by the trainer on the signature and the equirements for this section and the equirements for this section and the equirements of the Evidence of Achievement section have been met.	didate has been assessed by the trainer to work in accordance with standard pratory procedures. (No other evidence is required).
Candidate has answered questions set by the trainer on the knowled band skill components required to complete this module. (Evidence to sure this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evidence chosen by the candidate as an example of their competence in this area.  Date of completion:  Trainer's name:  Trainer's name:  Trainer's name:  Trainer's signature:	e of completion:
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# Section 7.4 Abnormal Haemoglobins and Thalassaemia

Subsection 7.4c Unstable haemoglobin

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Normal structure of the haemoglobin molecules.
- 2. Mutations in globin chains leading to the production of unstable haemoglobin.
- 3. Red cell indices and blood morphological features associated with unstance haemoglobin.
- Principles and practice of relevant techniques for detection of unstate haemoglobin.
- 5. Significance of abnormal results.
- 6. Internal quality control and external quality assessment procedu

#### **COMPETENCE**

- a. Check the suitability of sample quair analys.
- b. Match samples to patient uniqual dentition and are manufactured uniqual dentition and are man
- c. Perform named techniques for a determinent of unstable haemoglobin in accordance with standard laboratory locedu.
- d. Identify problems that day affect the sult and take corrective action.
- e. Identify samples the may require furthe investigations or action.
- f. Complete documental ir coordance with quality assurance and audit requirements

## **Section 7.4 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

# Section 7.4 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

# Section 7.5 Macrocytic Anaemia

## **Subsection 7.5a** Vitamin B12 and folate deficiency

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Metabolism of vitamin B12 and folate, and their role in haemopoiesis.
- 2. Causes of vitamin B12 and folate deficiency.
- 3. Changes in blood cell indices and morphological features associated at his vitamin B12 and folate deficiency.
- 4. Differences between, and causes of, megaloblastic and other types conacrocytic anaemia.
- 5. Red cell morphology and indices.
- 6. Folate cycle and role in cell production.
- 7. Neural tube defects.
- 8. Principles and practice of relevant techniques f the me prement or making B12 and folate.
- 9. Limitations of tests and further investigation that r = y be required.
- 10. Reference values and the significance of abn esults.
- 11. Internal quality control and external lity assement procedures.

#### **COMPETENCE**

- a. Check the sui sility of so the quality or analysis.
- b. Match sar les to patient un le intification and confirm urgency of analysis.
- c. Perform nai. http://iques.toil.\_asure vitamin B12 and folate status in accordance with landard in catory procedures.
- d. It intify problems to may affect the result and take corrective action.
- e. In tify somples that any require further investigation or action.
- f. Con ' e documentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
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Candidate has answered questions set by the trainer on the knowled bound skill components required to complete this module. (Evidence to support this required).
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## **Section 7.5 Reflective Practice**

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The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

# Section 7.5 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

**Section 7.6** Haematological Malignancies

Subsection 7.6a White cell malignancy

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Mechanisms of normal haemopoietic cell production and differentiation, and to consequences of abnormality.
- 2. Rationale and application of the World Health Organization (WHO) consists satisfication of haematological malignancies.
- 3. Changes in peripheral blood cell indices associated with white cell magnancy, including:
  - leucocytosis
  - leucopenia
  - thrombocytopenia
  - thrombocytosis
  - anaemia
- 4. Recognition and identification of typical mor, of cal indicators of malignancy, including:
  - leucoerythroblastic blood pi/ \_re
  - Auer rods
  - ring sideroblasts
  - signs of dysplasia
- 5. Recognition of the ty, I fer ares associated with the following malignancies:
  - acute myel a leukae.
  - acute ly phoblastic leuk, nia
  - chronic ri loid ukaemia
  - onic lymp. Tytic leukaemia
  - myelod splastic dromes
  - roliferative neoplasms ہے ' •'

Principles and ar incation of relevant techniques for the investigation of white cell malignants of including:

- hone marrow aspirate/trephine collection and examination.
- im. hophenotyping
- cytogenetics and molecular genetics
- 7. Initations of tests and further investigations that may be required.
- 8. Reference values and the significance of abnormal results.
- 9. Internal quality control and external quality assessment procedures.

#### **COMPETENCE**

- a. Check the suitability of sample quality for analysis.
- b. Match samples to patient unique identification and confirm urgency of analysis.
- c. Perform named techniques to investigate white cell abnormalities in accordance with standard laboratory procedures.
- d. Identify problems that may affect the result and take corrective action.
- e. Identify samples that may require further investigations or action.
- f. Complete documentation in accordance with quality assurance and auctrequirements.



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Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence to support this required).
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**Section 7.6** Haematological Malignancies

Subsection 7.6b Polycythaemia

### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Distinction between erythrocytosis and polycythaemia.
- 2. Mechanisms that lead to erythrocytosis and polycythaemia.
- 3. Changes in blood cell indices and morphological features associated of the polycythaemias.
- 4. Principles and practice of relevant techniques for the investigation on creased red cell counts.
- 5. Significance and methods of investigating mutations in *JAK2*, or a rnative molecular markers for the diagnosis of myeloprolifer an eoplasm
- 6. Limitations of tests and further investigations that may be required.
- 7. Reference values and the significance of abnoral result
- 8. Internal quality control and external quality sessment produres.

#### **COMPETENCE**

- a. Describe how to perform analysis to a stigate increased red cell count according to standard laboratory ocedure
- b. Identify problems that any rect results and take corrective action.

Date of completion:  Trainer's name:  Trainer's signature:  Candidate has answered questions set by the trainer on the knowled and skill components required to complete this module. (Evidence to suppose this required).  Date of completion:  Trainer's name:  Trainer's signature:  One other piece of evident chosen by the trainer on the knowled and skill components required to complete this module. (Evidence to suppose this required).  Date of completion:  Trainer's name:
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is is to confirm the the knowledge and competence requirements for this section and the equirement of the Evidence of Achievement section have been met.
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## **Section 7.6 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

# Section 7.6 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this ser

## Section 7.7 Haemostasis Abnormalities

**Subsection 7.7a** Bleeding disorders

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles and components of the haemostatic pathways.
- 2. Principles and significance of the screening tests for coagulation are cone clott. factors, which are measured by PT, APTT and TT.
- 3. Coagulation abnormalities associated with the haemophilias A B and C, von Willebrand disease and other factor deficiencies.
- 4. Coagulation abnormalities associated with acquired defects.
- 5. Bleeding abnormalities, associated with platelet and vessel defe
- 6. Replacement therapy and complications.
- 7. Principles, practice and limitations of techniques to a. ss specific lation factor deficiencies (e.g. one-stage clotting assays).
- 8. Principles and practice of techniques to letect present of coagulation factor inhibitors.
- 9. Principles and practice of techniques to asse. I elet function.
- 10. Pre-analytical variables that can aff sults
- 11. Normal reference values and the significance of ab. results.
- 12. Internal quality control and excental qua
- 13. Differences between asses in the coosis of ficiency and monitoring of treatment.

## **COMPETENCE**

- a. Chark the suitable of sample quality for analysis.
- b. The same less to punt unique identification and confirm urgency of analysis.
- c. Pe. rr actor assays, inhibitor assays and VWF parameter analysis according to stand. 'laboraty procedures.
- d. dentify by is that may affect the result and take corrective action.
- e. Identify san ples that may require further investigations or action.
- f con to documentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordan laboratory procedures. (No other evidence is required).	te with standard
Date of completion:	
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## Section 7.7 Haemostasis Abnormalities

#### **Subsection 7.7b** Thrombotic disorders

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles and components of the haemostatic pathways and its natural inhibite
- 2. Thrombotic risks associated with reduced levels of inhibitors and co-feeds.
- 3. Thrombotic risks associated with defects that are detected using ger cic analysis, such as:
  - Factor V Leiden
  - Prothrombin G20210A gene mutation
- 4. Principles and practice of techniques to investigate thrombotic ris ssociated with thrombosis, including:
  - Clotting (i.e. protein C activity, protein S activity, accented processistance assays)
  - Chromogenic (i.e. antithrombin activity protein Coctivity)
  - Immunoassays (i.e. free protein S antigen, in C antigen, antithrombin antigen)
- 5. Pre-analytical variables that can affect realts.
- 6. Normal reference values and the ignificant of abnormal results.
- 7. Internal quality control 2 a external ality associated ment procedures.

## **COMPETENCE**

- a. Che the suitate v of sample quality for analysis.
- b. I atch sample to part unique identification.
- c. From alysis for the investigation of thrombotic disorders according to standard laborary procedures (e.g. thrombophilia screen).
- Land Identity Toble: That may affect the result and take corrective action.
- e. dentify sa es that may require further investigations or action.
- f ete documentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
Date of completion:
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# Section 7.7 Haemostasis Abnormalities

Subsection 7.7c Lupus anticoagulant

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Principles and components of haemostatic pathways.
- 2. What is meant by the term 'lupus anticoagulant'.
- Principles and significance of the screening tests for coagulation and the potential influence of lupus anticoagulants on them.
- 4. Effect of lupus anticoagulants on clotting based tests (e.g. international informalised ratio [INR], one-stage factor assays).
- 5. Principles and limitations of techniques to demonstrate the parence carbons anticoagulants (e.g. screening, confirmatory and mixing tests for says sudilute Russell's viper venom time [dRVVT] and active cartial three hoplastin time [APTT]).
- 6. Interpretive procedures for distinguishing lupic anticoas ants from outer causes of elevated clotting times.
- 7. Pre-analytical variables that can affect res . .
- 8. Normal reference values and the significance from all results.
- 9. Internal quality control and external lity assement projectures.

#### **COMPETENCE**

- a. Check the sui sility of so the qualit for analysis.
- b. Match sar le to patient un la ir' lification.
- c. Perform lup antic agulant schening assays in accordance with standard labor cory procures.
- d. It is not problems and take corrective action.
- e. In tify simples that may require further investigations or action.
- f. Con ' e documentation (paper or electronic) in accordance with quality assurance and au requir nents.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
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## **Section 7.7 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

# Section 7.7 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.



# Section 8: (Opicas)

# Hospital Transfusion Practice

This section covers the page of procedures and diagnostic techniques that have been identified as being post relegate to practice as a specialist biomedical scientist working in haematology with an option in spitz pransfusion practice. Candidates completing these sections are expected to be able to be abled to

It is cepted hat some of these tests may not be performed in the candidate's own laborator. It is another borator to the level of someone performing them regularly, knowledge and uncerstanding of it application is still required and may be examined.

The other tests, outside of those listed in this portfolio, that are part of the aining laboratory's basic repertoire in which the individual is required to be competent. The acan be recorded in the reflective statement at the end of each sub-section

# Section 8.1 Patient and Donor ABO/D Typing and Antibody Screening

Subsection 8.1a Routine ABO/D typing and antibody screening

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. The basis of the major blood group systems (e.g. genes, antigens and antibodie their clinical significance in transfusion medicine.
- 2. Principles of the indirect antiglobulin test (IAT), and of commonly us a technologies available for detection of clinically significant antibodies.
- 3. Factors affecting antigen-antibody reactions in vitro.
- 4. Principles of serological tests used in manual and automated od growing and antibody screening, their appropriate use and potential sources arror.
- 5. Increased security afforded by the electronic transfer and PO/D and atibody screening results from automation to the LIMS.
- 6. Specifications of reagents for patient blood gre ping and atibody screening, the rationale behind their selection, and control equired depeding on the testing system and methods used.
- 7. The use of potentiators in routine reagents a. +' potential difficulties in result interpretation.
- 8. Validation of reagents prior to 1/2 and a ions to to 1/2 any cases where validation fails
- 9. Minimum specifications for blood and ping in regency situations, and before the issue of group compating blood.
- 10. The relevance of er eous and anomal results of patient testing.
- 11. Internal quality controlled ... dernal quality assessment procedures.
- 12. Local policies d proced s and nat nal guidelines covering all of the above.

#### **COMPETENCE**

#### Be able to:

- a. Apply sample acceptance criteria and demonstrate understanding of the risks associated with inadequately labelled samples in transfusion.
- b. Perform indirect antiglobulin tests (IAT) and demonstrate an understanding of possible sources of error dependent on the technology used and the pati is clinical condition.
- Perform blood grouping and antibody screening tests using manual and auto. ted methods.
- d. Complete documentation accurately and in accordance with quality control and audit requirements, use IT and follow procedures to mining either risk of transcription error.
- e. Select and apply appropriate controls, recognise control fail. s and shifty furth actions required.
- f. Interpret patient blood grouping and antibody screening , ults, recognise anomalies and identify further actions required.
- g. Provide safe blood components for patients, where clin. Hy necessary, efore a confirmed ABO/D result can be established.



Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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## Section 8.1 Patient and Donor ABO/D Typing and Antibody Screening

Subsection 8.1b Investigation of ABO and RhD anomalies

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Clinical and laboratory factors that may affect results of ABO/D typing.
- 2. Clinical and laboratory factors that may lead to anomalous results of A typing
- 3. Principle and practice of investigating blood group anomalies in pecific patient groups (e.g. paediatric, elderly and immunosuppressed patients).
- 4. Principles and practice of investigating blood group anomalies in va us clinical an technical scenarios, including:
  - Haemopoietic stem cell transplantation
  - Presence of cold agglutinins
  - Transfusion reactions
  - Potential 'wrong blood in tube'
- 5. The scientific basis and significance of A subgroons and work/partial D types in patients.
- 6. Limitations of testing when using ramantisera.
- 7. How to interpret anomalor groung result clinical and laboratory circumstances and selection of the and paropriate imponents for the patient.
- 8. Criteria and trigger factors for fun or suns referral before a blood group can be assigned.
- 9. Local policies and presedures and national guidelines covering all of the above.

#### COMPETENCE

#### Be able \*

- a. pare samples and lect reagents and controls.
- b. Se. propriate tests to investigate ABO/D anomalies and perform them in according with andard laboratory procedures.
- c. Interpret signs of tests and controls and distinguish between normal, erroneous and anomalous results.
  - Ass. propriate blood groups to patients to ensure safe transfusion practice. Identify samples requiring additional testing and possible referral.
- f. Complete documentation in accordance with quality assurance and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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## **Section 8.1 Reflective Practice**

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The external examiner will review this reflective report which should cross refere at the evidence contained in the portfolio. This may lead to further discuss and during a viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

## Section 8.1 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this sezon.

## Section 8.2 Antibody Identification

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- The basis of the major blood group systems, characteristics of red cell antige
  within each system and clinical significance of corresponding antibodies in pretransfusion and antenatal scenarios.
- 2. Mechanisms of antigen:antibody reactions and their role in *in vivo* r cell destruction.
- 3. Principles, practice and application of the range of tests available to lantibody identification.
- 4. How to positively identify antibody specificities using British Soc. of Hacassy (BSH) guidance on inclusion.
- 5. How to systematically exclude antibody specificities a art or identification process.
- 6. Relevance of red cell phenotyping in antibo identification.
- 7. How to interpret results, recognise and der with samples requiring further investigations.
- 8. Internal and external quality assur rocedu.
- 9. Local policies and procedures a nation guideling aring all of the above.

#### **COMPETENCE**

#### Be able to:

- a. Prepare so ples, select reage tso a controls.
- b. Perform rowe recell antiboy identification tests in accordance with standard labe cory procures.
- c. Ir erpret the real of antibody identification, and recognise cases requiring litional advice.
- d. Receive the likely clinical significance of the antibody specificities identified and select sele
- e. Complete mentation in accordance with quality assurance and audit

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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## **Section 8.2 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

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## Section 8.2 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this segment.



## Section 8.3 Red Cell Phenotyping

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Relevance of red cell phenotyping in pre-transfusion and antenatal testing.
- 2. Rationale for extended red cell phenotyping for patients on long-term transition support, and know which groups of patients may require blood match a for antiger other than ABO and D.
- 3. Situations in which red cell phenotyping cannot be performed a genotyping is required.
- 4. Selection of reagents and controls for red cell phenotypes.
- 5. Requirements for validation of reagents prior to use
- 6. Relevance of antithetical groups when performing real II pnen.
- 7. Internal quality control and external quality a cassment percedures.
- 8. Local policies and procedures and national uidelines covering all of the above.

#### **COMPETENCE**

## Be able to:

- a. Recognise situations were phenotypin vill not give a reliable result.
- b. Prepare samples and a pet agents and controls.
- c. Perform extermed red a phenoticing in accordance with standard laboratory procedure
- d. Identify apply riat antithetical and familial antigen groups required for a complete physique.
- e. erpret rosults an 'istinguish between normal, unusual, erroneous and abnormal re. 's
  - Comp. odocur itation in accordance with quality control and audit requirements.
- g. dentify s. r s requiring referral for additional testing.

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## **Section 8.3 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

## Section 8.3 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this second.



## Section 8.4 Selection of Red Cells and Components

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Criteria for the selection of donors and the mandatory tests performe on all donations.
- 2. Extended and additional testing performed on donations for sr and patic categories (e.g. neonates).
- 3. Principles of blood component preparation, and the range of blood components available.
- 4. How to interpret tests and their results from other areas/scriplines of pathology (e.g. haematology and coagulation) in clinical context to degraine context to degrain cont
- 5. Alternatives to allogeneic blood transfusion.
- 6. Importance of communication with all staff gr .ps invo. d in effective provision of transfusion support in routine and emerger, situations.
- 7. Criteria for selection of red cells and complents for patients the clinical conditions giving rise to special requirements (e.g. h. T. JT, neonates, AIHA, solid organ transplants, red cell antibodies).
- 8. Rationale for selection of red certain and components it additional specifications (e.g. irradiated, CMV negative, Sinegroup K- for females of child-bearing potential, phenotyped).
- 9. Relevant internal qual; control and 'ernal quality assessment procedures.
- 10. Main requirements national ruideline elating to the above.
- 11. Local policies and proce 'urr' and national guidelines covering all of the above.

#### **COMPETENCE**

## Be al . to:

- a. Detaile what tests are required before issuing blood or components.

  Select approvate blood component to meet the patient's special requirements.
- c. Provide s. d effective blood and components for emergency use.
- d. Provide transfusion support in cases of major haemorrhage, demonstrating the ability, communicate effectively with all parties involved.
  - Recognise the potential need for specialist products (e.g. cryoprecipitate, PCC).
- f. \_\_\_omplete documentation in accordance with quality control and audit requirements.
- g. Identify cases requiring specialist components, products or clinical advice.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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## **Section 8.4 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

## Section 8.4 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this se

#### Section 8.5 **Pre-Transfusion Testing Procedures**

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Importance of pre-transfusion testing in establishing compatibility.
- 2. Value of a historical record in pre-transfusion procedures.
- 3. The role of IT and automation in improving security in pre-transfusion and security in pre-transfusion.
- 4. Criteria for suitability of samples for serological crossmatching/ ectronic issue, depending on the patient's recent transfusion and obstetric history
- Principles and practice of serological compatibility testing.
- Principles and practice of 'electronic' and remote issue of \_\_od an \_\_omponer and the criteria for use.
- 7. How to investigate an incompatible serological cross
- 8. Internal quality control and external quality assessme proces
- 9. Local policies and procedures and national guir lines co. ing all of the above.

#### **COMPETENCE**

#### Be able to:

- a. Determine what tests are equired the issulting lood or components.
  b. Determine whether or of patients a full table for electronic issue.
- Perform necessary ampatibility tests a accordance with standard laboratory procedures.
- d. Clearly distinguish between normal and abnormal results.
- Evaluate quests for furt, b' od components to decide whether additional samples/tes are r juired betwee issue.
- f. Comete docuntation in accordance with quality control and audit requirements.
- It intify cases whe additional testing or clinical advice is required.

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## **Section 8.5 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this second.

## Section 8.5 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this ser

#### Section 8.6 **Issuing of Blood Components and Products**

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Correct procedures for the labelling and issue of blood components and proc ts by the transfusion laboratory for patient use.
- Subsequent storage requirements and expiry times of thawed plasma soucts.
- 3. Relevant storage and transport criteria for issued blood components products.
- Procedures for traceability, recall, restocking and disposal of blood mponents and products.
- Local policies and procedures and national guidelines covering II of the hove.

## **COMPETENCE**

#### Be able to:

- Prepare fresh frozen plasma (FFP) and cryopi in late for issue.
- b. Visually inspect blood components sure the are fit follows.
- Label and issue blood compone s/proc ts via IT to ensure complete traceability.
- d. Manage requests for furt' r red c ompon or products.
  e. Manage return of unit a blood components/products.
- Complete documen ion in acordance ith quality control and audit requirements.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
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## **Section 8.6 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

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## Section 8.6 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this se

## Section 8.7 Blood Stocks Management

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- Risks associated with inappropriate care and handling of blood components products.
- 2. Principles of appropriate use of blood and blood components.
- 3. The requirement for traceability from donor to patient and vice vers
- 4. The role of stock management in the efficient use of blood.
- 5. The role of the Blood Stocks Management Scheme (BSMS).
- 6. Local policies and procedures and national guidelines covering II of the hove, including emergency blood management where national stock is are

#### **COMPETENCE**

#### Be able to:

- a. Check stocks and place routine ders with blood size in accordance with standard laboratory procedure.
- b. Order blood and blood component in outline in non-routine situations.
- c. Sort and rotate stock to ensure the note efficient use of stock is achieved.
- d. Collect data for the MS and st on fee ack to minimise wastage.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
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## **Section 8.7 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

## Section 8.7 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

#### Section 8.8 Adverse Reactions and Events in Transfusion

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Classification and characteristics of adverse reactions to transfusion.
- 2. Laboratory-based procedures for investigating suspected adverse reactions according to clinical presentation.
- 3. The process for internal and external recall.
- 4. The role of internal and external incident reporting (e.g. Serious Adverse Blood Reactions & Events [SABRE] / Serious Hazards of Transfusion [SHOT], reducing errors in blood transfusion.
- 5. Principles and application of root cause analysis.

#### **COMPETENCE**

#### Be able to:

- a. Respond to reports of suspected a reaction events accordance with standard laboratory procedures
- b. Identify the probable 'type' of the 'erse restriction/event.
- c. Identify the samples required and from appriate testing.
- d. Complete an internal alor alor external call in accordance with local laboratory procedures.
- e. Perform repeat testing or and post-transfusion samples in cases of suspected haemolytic transfusion rections.
- f. Interpret r ults in clinical cu axt
- g. Recognise with a refural for advisional testing is required.
- h. Comete docuntation in accordance with quality control and audit requirement in uding relevant ternal and external incident reporting.
- Assess need report to SHOT and/or SABRE, and for internal SAE reporting.
- k. Take part by t cause analysis if required.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
Date of completion:
Trainer's name:
Trainer's signature:
One other piece of evidence chosen by the candidate as an example of their competence in this area.
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Trainer's name:  Trainer's signature:  It is is to confirm the the knowledge and competence requirements for this section and the equirement of the Evidence of Achievement section have been met.

## **Section 8.8 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere the evidence contained in the portfolio. This may lead to further discus and during viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

## Section 8.8 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

# **Section 8.9** Antenatal Testing and Procedures

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Requirements for routine antenatal testing.
- 2. How to perform and interpret results of antenatal screening for red cell antibou
- 3. How identify samples requiring further investigation.
- 4. Clinical significance of red cell antibodies in the context of haemolyt disease of the fetus and newborn (HDFN).
- 5. Requirements for antenatal and post-natal follow up testing where coically significant antibodies are detected.
- 6. Importance of communication in successful management of pregnation with red cell antibodies.
- 8. Principles of acid-elution/staining and flow cyt hetric much hods for measuring fetal maternal haemorrhage (FMH).
- 9. How to interpret FMH results and instigat "proprice follow testing."
- 10. How to determine the dose of anti-D immun. 'a' ain required.
- 11. Local policies and procedures and al guio es cover g all of the above.

#### **COMPETENCE**

#### Be able to:

- a. Perform rout' antenata nd post-r lal testing.
- b. Identify cas where further 'es', ation or action is required.
- c. Provide app. `riat' intenatal a ai-D prophylaxis as RAADP, and to cover potentially sens' sing ever
- d. P vide appropria post-natal anti-D prophylaxis as a standard dose and to cover identified FMH.
- e. Per routine FMH testing by acid elution.
  - Decide hen sar ples require referral for additional or specialist testing.
- g. Commun. Twith all staff groups involved to ensure delivery of anti-D prophylaxis appropriate laboratory follow up of pregnancies where red cell antibodies are iden.
  - Complete documentation in accordance with quality assurance and audit aquirements.

## **EVIDENCE OF ACHIEVEMENT**

This section requires the trainer to sign that the candidate has successfully achieved fitness to practice as a biomedical scientist at the specialist level. The candidate is required to present the supporting evidence indicated below as a separate specialist portfolio of evidence.

Candidate has been assessed by the trainer to work in accordance with standard laboratory procedures. (No other evidence is required).
Date of completion:
Trainer's name:
Trainer's signature:
Candidate has answered questions set by the trainer on the knowleds and skill components required to complete this module. (Evidence in Supplemental).
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## **Section 8.9 Reflective Practice**

This section is used to demonstrate that you can relate knowledge from several areas, draw conclusions and reflect on your own performance with regard to current and future practice as an independent professional learner. It is therefore a useful source of information for your CPD profile should you be audited by the Health and C re Professions Council (HCPC).

The external examiner will review this reflective report which should cross refere the evidence contained in the portfolio. This may lead to further discus and during viva voce.

Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

# Section 8.9 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

# Section 8.10 Haemolytic Disease of the Fetus and Newborn

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. Aetiology of haemolytic disease of the fetus and newborn (HDFN).
- 2. Significance of red cell antibodies in HDFN.
- 3. Criteria and methods for quantification of antibodies in pregnancy.
- 4. The need to differentiate between immune and prophylactic anti-D
- 5. The role of paternal testing and fetal genotyping in monitoring HDF
- 6. Routine testing required on neonates and additional testing required then the mother has red cell antibodies.
- 7. Transfusion requirements for the treatment of HDFN.
- 8. Criteria for the selection of blood for intrauterine transion (IUT), change and top-up transfusions.

#### **COMPETENCE**

#### Be able to:

- a. Prepare samples, and select co. ct rear and controls for all testing.
- b. Undertake compatibility ting a pride open priate blood components for the fetus/neonate as IUT. Change or to transfusion, in cases of HDFN due to red cell antibodies.
- c. Perform a direct antigorulin lest (DAT) on cord blood sample and comment on the significance come results
- d. Complete cumentation in for ance with quality assurance and audit requirement

## **EVIDENCE OF ACHIEVEMENT**

This section requires the trainer to sign that the candidate has successfully achieved fitness to practice as a biomedical scientist at the specialist level. The candidate is required to present the supporting evidence indicated below as a separate specialist portfolio of evidence.

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# **Section 8.10 Reflective Practice**

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Candidate's Reflective Practice Statement Part 1.

Summarise your role within the laboratory in the context of this secon.

# Section 8.10 Candidate's Reflective Practice Statement Part 2.

The ethos of undertaking reflective practice should be the recognition that it is a naturally occurring characteristic of those wishing to develop. How you complete this section is personal to your own circumstances. It should be approached by recognising you have a responsibility to demonstrate self-awareness when analysing gaps in your knowledge his is therefore an opportunity to reflect on aspects of training, the application new knowledge and skills, and how goals have been achieved.

Personal reflection on your training and examples of evidence for this second.

# Section 8.11 Investigation of Red Cell Autoantibodies

#### **KNOWLEDGE**

The candidate is expected to be able to demonstrate knowledge and understanding of the following:

- 1. The main reasons for *in vivo* sensitisation of red cells with immunoglobulins ( '/or complement in autoimmune haemolytic anaemias and post-transplantation.
- 2. The mechanism of *in vivo* red cell destruction.
- 3. Principles and practice of direct antiglobulin techniques (DAT) using monospecific antiglobulin reagents.
- 4. How a positive DAT may influence results of pre-transfusion testing.
- 5. How to provide blood for patients with autoantibodies.
- 6. Internal quality control and external quality assessment procedu
- 7. How to interpret results and deal with samples requirement tigations.

### **COMPETENCE**

#### Be able to:

- a. Perform a DAT using poly- and nospe fic reage.
- b. Interpret results of tests and corrols, a distinguish between normal, erroneous and anomalous results.
- c. Identify samples requing further or ditional testing.
- d. Complete documen ion accurately in a ordance with quality control and audit requirements.

## **EVIDENCE OF ACHIEVEMENT**

This section requires the trainer to sign that the candidate has successfully achieved fitness to practice as a biomedical scientist at the specialist level. The candidate is required to present the supporting evidence indicated below as a separate specialist portfolio of evidence.

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## **Section 8.11 Reflective Practice**

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# Section 8.11 Candidate's Reflective Practice Statement Part 2.

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Personal reflection on your training and examples of evidence for this second.



## **About this document**

**Document title**: Record of Laboratory Training for † Specia Diploma III

Haematology with Hospital Transfusion Practice

**Produced by:** Education and Professional Standard mmittee

**Contact:** Education Department

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