



REGISTRATION TRAINING PORTFOLIO V5.0

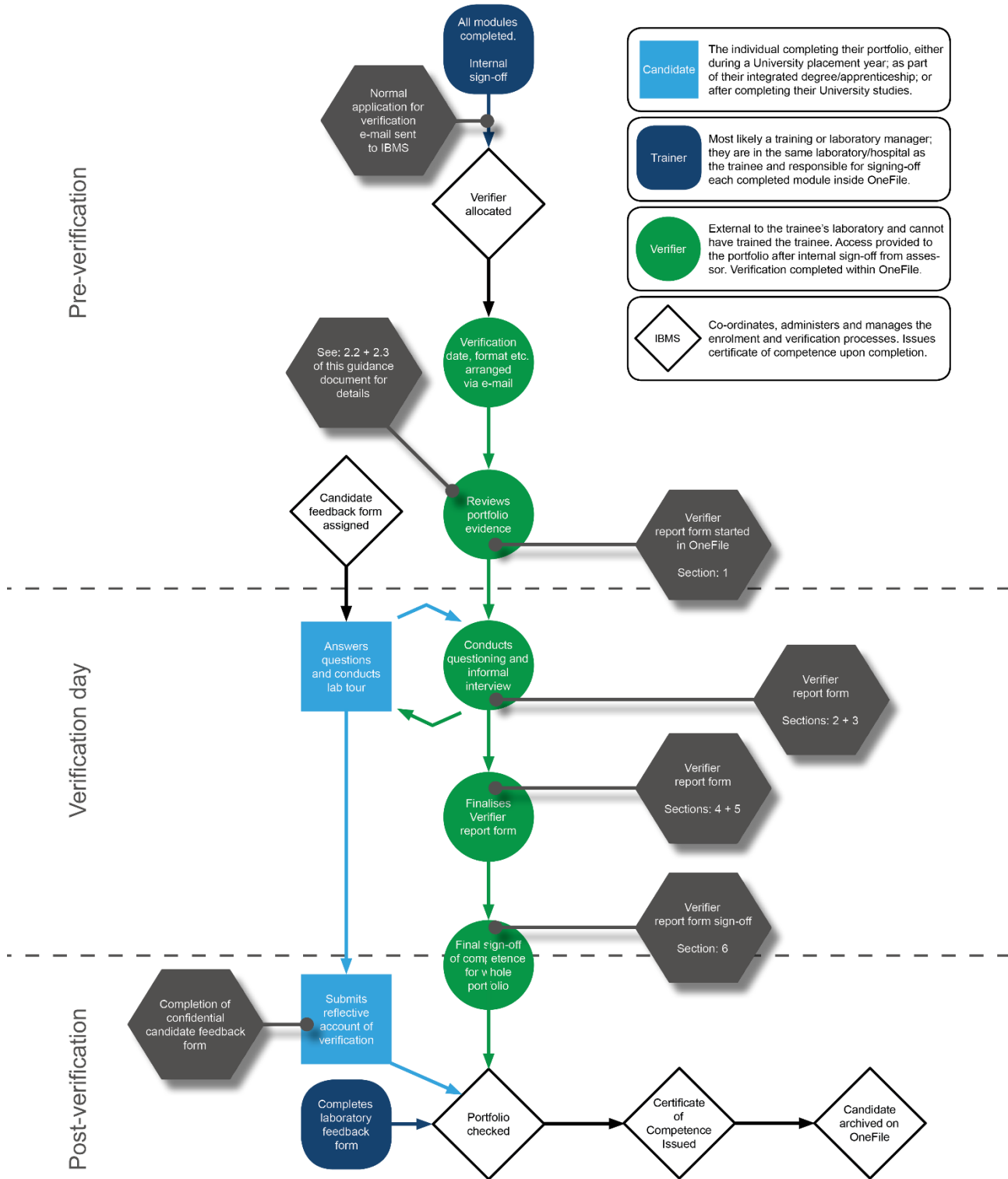
OneFile User Guide for
PORTFOLIO VERIFICATION

Verifier · Trainer · Candidate

Contents

1 Verification Process	4
2 Information for Verifiers	5
2.1 The OneFile Verifier Dashboard	5
2.2 Opening the correct portfolio and preparing to verify the Candidate's evidence	7
2.3 Verifying evidence in the Candidate's portfolio	8
2.4 The Verifier Report Form	15
2.5 The Verification visit/meeting	18
2.6 Verification Outcomes – Verifier	21
3 Information for Trainers/Managers.....	25
3.1 In advance of the verification visit/meeting	25
3.2 On the day of verification	26
4 Information for Candidates	29
4.1 Before the verification	29
4.2 During the verification	30
4.3 After the verification	30

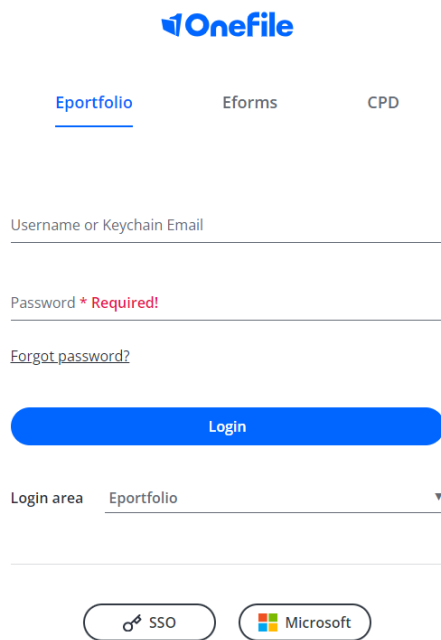
1 Verification Process



Arrow colour denotes responsibility - progress will be blocked by OneFile until the responsible person completes their action

2 Information for Verifiers

2.1 The OneFile Verifier Dashboard



Log in at <https://login.OneFile.co.uk> and enter your **username** and **password**.

Your username will be the email address you registered with. You will be sent an initial email (please check SPAM/JUNK folders) and can then set your unique password.

Using your email address will create a **Keychain** which means you will see any other OneFile portfolios you have linked to that email address.

If you are also a Trainer, when you login, you will see a landing page with both your Trainer and Verifier accounts listed.

You need to select the Verifier account in order to verify a Candidate.

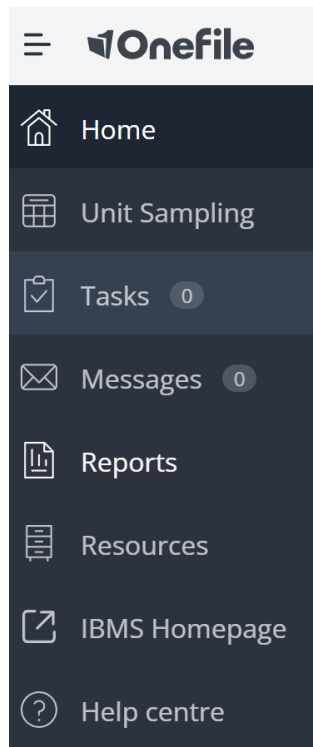
2.1.1 Homepage

When you log in for the first time you will need to accept the terms and conditions for OneFile. After this you will see any service announcements from the IBMS.

Initially, this will be your Welcome message.

2.1.2 Sidebar icons

The sidebar icons are similar to those of the Trainer and Candidate role, such as:



Home - (for the Dashboard).

Tasks – anything requiring action.

Messages – any messages received.

Reports – list of generatable reports.

Resources – IBMS shared resources.

IBMS Homepage – Link to the IBMS website.

Help Centre – access to OneFile generic help pages.

In addition to the buttons visible to Trainers, an additional button called “Unit Sampling” is available to Verifiers. Pressing this button will allow Verifiers to find the completed Candidate portfolio – see section: 2.2 (p.15)

2.1.3 Other Options

At the bottom of your Dashboard you can also find links to additional options such as:

My Profile – update your profile and personal details here. Add a profile picture.

Display Settings – customised the look of OneFile changing the appearance of text and colour schemes.

Email Preferences – make sure you stay notified of tasks that require your attention. Configure email notifications here.

My Activity – view all your activity logs.

User Guides – view the user guides from OneFile.

Read System Announcements – select this to read updates from OneFile. If there are announcements a number will appear in the bracket at the side of this section.

2.2 Opening the correct portfolio and preparing to verify the Candidate's evidence

2.2.1 Accessing the Candidate's Verification record

1. From the Home page, click the **Unit Sampling** button on the left-hand menu. This will open a page with a “unit sampling table”.
2. Ensure that your name is highlighted in the “Select a Verifier” section, then click “submit” on the right-hand side of this box (leaving all other values unchanged). The “Verifier Unit Sampling table will open, which lists the Candidate(s) currently assigned to you for verification.

VERIFIER Unit Sampling Table (1) Candidate selection: Single-mode Zoom table: - +

Simple Planned Sample with Anticipated Completion Dates Actual Sample with Unit Signed Off Dates
 Advanced Show Pending Unit Rejections Show Assessment Processes

Candidate Name ▲	Started	Section 1 - Module 1	Section 1 - Module 2	Section 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5	Section 2 - Module 1	Section 2 - Module 2	Section 2 - Module 3	Section 2 - Module 4	Section 2 - Module 5
Taylor (for testing), Jim	10/10/2023	24/02/2024	24/02/2024	24/02/2024	24/02/2024	24/02/2024	24/02/2024		24/02/2024	24/02/2024	24/02/2024

Assessment Methods
 APL APL CCR Candidate Choice MER Mandatory Evidence

Planning & Sampling
 [R] Pending unit rejection [FP] Formative Planning [FS]

Centre Specific VERIFIER Processes

2.2.2 Check that all modules have been signed-off by the Trainer and Candidate.

In order to access the evidence for verification, both the Trainer and Candidate must have signed-off each module after it has been completed. The verification table associated with the Candidate will show the date that the particular module was signed-off (see image above).

Depending how individual laboratories use OneFile, it is possible that all modules will have the same sign-off date; or that the dates will be different – both approaches are acceptable.

If some modules have not been signed-off (no date in the box), contact the Candidate's Trainer and ask them to ensure that all modules are signed-off by both the Trainer and Candidate.

2.3 Verifying evidence in the Candidate's portfolio

Verification of the portfolio requires Verifiers to sample 100% of the final versions of evidence submitted by the Candidate. As was the case with previous (non-digital) versions of the Registration portfolio, the exact layout of the evidence within the portfolio will vary depending on the local approach taken by the training laboratory. If you are unclear of the structure or location of documentation within the portfolio, we recommend contacting the relevant Trainer for further guidance.

This section of the verification guide should be read in conjunction with section: 2.4 (p.21) which outlines how to complete the Verifier report form. You may wish to have the Verifier report form open in another browser tab at the same time as completing your scrutiny of the Candidate's evidence in order to put comments directly into the report form.

2.3.1 Opening the module and accessing evidence

1. Starting with whichever module you prefer, click the date that the module was signed-off by the Trainer and Candidate, this will open the Unit summary page:

All Units	Section 1 - Module 1 Unit Summary	Outcome 01	Outcome 02
Select a unit: Section 1 - Module 1			
Candidate Name	Learning Aim	Awarding Body Reg.	
Jim Taylor (for testing)	Registration Training Portfolio (V5)	Pending	
[Section 1 - Module 1] Personal Responsibility and Development			
Section 1 - Module 1	Progress	Total	
[Outcome 02] Competency	<div style="width: 100%;"></div>	100%	
[Outcome 01] Knowledge	<div style="width: 100%;"></div>	100%	

2. Scroll to the “Related Assessments” section of the page, this is where you will access the evidence in order to verify it. Note that the evidence reference numbers are currently blue in colour. “MER” is the prefix assigned by OneFile to all pieces of mandatory evidence; “CCR” represents the Candidate (free) choice evidence.

Assessment Method	Assessment References
Candidate Choice	CCR1 CCR2
Mandatory Evidence	MER1

3. Click the reference number of the first piece of evidence you wish to verify to open the evidence. As the Verifier, the information you are presented with is exactly the same as that seen by the Candidate and Trainer – as such, you can be confident that all parties are working from the same basis. As a reminder, the sections of the page are as follows:
- **Task overview** – provides details the task, instructions given to the Candidate and links to relevant learning resources/support material.
 - **Assessment** – confirms whether this is a piece of Mandatory Evidence, or a Candidate Choice. In some circumstances “APL” may appear in this section, which stands for Accredited Prior Learning. APL is most likely to be used in portfolio’s being verified for HCPC registration by Equivalence.
 - **Criteria** – highlights the SoP’s which were pre-mapped by the IBMS to this assessment. You may notice these SoP’s appear in two different shades of blue:
 - **Darker blue:** the Trainer has confirmed that this SoP is met by this piece of evidence.
 - **Paler blue:** the Trainer deselected the SoP at the point of evidence sign-off, as they believed this/these SoP’s were not addressed by this evidence.
 - **Evidence** – the submission that the Candidate made against this task. The evidence may be typed directly into the box, or it may be a series of attached documents. The approach taken will vary from one laboratory to another, but we anticipate that the structure, layout and approach taken within each module of the same portfolio will be consistent.
 - **Feedback & Comments** – this should start with the Candidate’s justification for the submission, and then proceed to show an iterative process of feedback and communication between the Trainer and Candidate.

The next section continues overleaf.

2.3.2 Verifying the evidence

1. Scroll to the **evidence** section of the page and view/download the evidence as appropriate to the type and manner in which it was provided.
 - **Direct-digital evidence** – If the evidence and feedback are provided directly into the evidence section of the submission, you are able to toggle between final and historic versions of the evidence using the buttons on the right-hand side of the submission.
 - **Attached files** – You may need to download pdf/word documents that were attached to the portfolio and view them in their native application (e.g. MS Word, Adobe acrobat etc.). Some file types are supported by Turnitin for purposes of plagiarism detection. The turnaround time for originality reports via Turnitin is slow (circa 24h) but links will be provided on the submission as soon as Turnitin reports are available. OneFile also accepts images/audio/video files, so some Candidates may have included these as attachments

Once you have reviewed the evidence submitted by the Candidate and considered the feedback comments or any other information provided by the Trainer, you must decide whether you accept the submission and agree that the relevant SoP's have been addressed.

2. Scroll to the “Criteria” section of the page, and depending on which option is most appropriate, the step(s) you take next will vary:

OPTION: 1 The evidence meets ALL of the SoP's mapped by the Trainer – see p.11

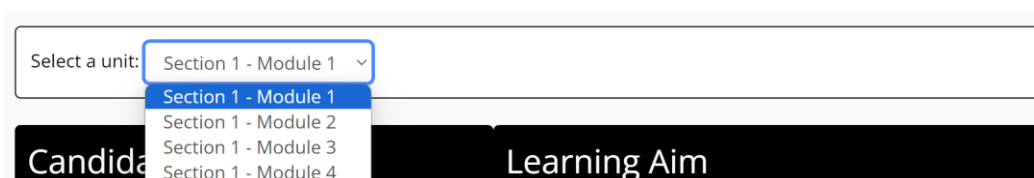
OPTION: 2 The evidence meets the majority (but not all) of the mapped SoP's – see p.12

OPTION: 3 Insufficient SoP's have been met; additional evidence required – see p.13

NB: For Mandatory evidence (MER), the pre-mapped SoP's are the **minimum** required for that evidence.

For Candidate choice (CCR), the pre-mapped SoP's can be demonstrated by **either** piece of evidence.

3. Once you have scrutinised all pieces of evidence in the module, use the “select a unit” dropdown at the top of the screen to begin your scrutiny of the next module. Repeat this process for all ten modules



OPTION: 1

Agreeing with the SoP mapping of the Trainer is the most likely outcome. In order to confirm that you agree with the assessment decision of the Trainer, follow the screenshots below...

Criteria Hide Descriptions

Tick boxes to: **1** Ensure "Sample checked criteria" is selected **2** Click "All" to select all criteria mapped below

[Section 1 - Module 1] Personal Responsibility and Development

[Outcome 01] Knowledge

Standards of Proficiency

- [SoP 2.10] - Understand and apply legislation, policies and guidance relevant to their profession and scope of practice
- [SoP 2.4] - Understand what is required of them by the Health and Care Professions Council, including but not limited to the Standards of conduct, performance and ethics
- [SoP 2.8] - Understand the importance of capacity in the context of delivering care and treatment
- [SoP 2.9] - Understand the scope of a professional duty of care and exercise that duty

[Outcome 02] Competency

Standards of Proficiency

- [SoP 1.1] - Identify the limits of their practice and when to seek advice or refer to another professional or service
- [SoP 1.3] - Keep their skills and knowledge up to date and understand the importance of continuing professional development throughout their career
- [SoP 2.1] - Maintain high standards of personal and professional conduct
- [SoP 2.12] - Demonstrate awareness of the British, European and International Standards that govern and affect pathology laboratory practice
- [SoP 2.2] - Promote and protect the service user's interests at all times

The criteria will turn red

Criteria Hide Descriptions

Tick boxes to:

[Section 1 - Module 1] Personal Responsibility and Development

[Outcome 01] Knowledge

Standards of Proficiency

- [SoP 2.10] - Understand and apply legislation, policies and guidance relevant to their profession and scope of practice
- [SoP 2.4] - Understand what is required of them by the Health and Care Professions Council, including but not limited to the Standards of conduct, performance and ethics
- [SoP 2.8] - Understand the importance of capacity in the context of delivering care and treatment
- [SoP 2.9] - Understand the scope of a professional duty of care and exercise that duty

[Outcome 02] Competency

Standards of Proficiency

- [SoP 1.1] - Identify the limits of their practice and when to seek advice or refer to another professional or service
- [SoP 1.3] - Keep their skills and knowledge up to date and understand the importance of continuing professional development throughout their career
- [SoP 2.1] - Maintain high standards of personal and professional conduct
- [SoP 2.12] - Demonstrate awareness of the British, European and International Standards that govern and affect pathology laboratory practice
- [SoP 2.2] - Promote and protect the service user's interests at all times

If there are points you wish to raise with the Candidate/Trainer during the verification, make a separate note of these, or include them in the Verifier report form. Don't forget that the Verifier report form must include comments about the evidence submitted for each module – see section: 2.4 (p.15) for further information.

Scroll down to the section titled "Internal Verifier" and click the **Accept** radio button

Internal Verifier (invisible to Candidate)

Assessment decision:

Accept

Resubmit - Send back to Trainer

Assessment judgements:

Safe Fair Valid Reliable

Scroll to the bottom of the page and tick your signature box. Click **Save & Quit** to finish your scrutiny of this piece of evidence and return to the Unit Summary. The OneFile reference for the evidence you have just verified will turn **red**. Return to step: 1 of section 2.5.2 to verify the next piece of evidence.

OPTION: 2

If the evidence demonstrates some of the SoP's signed-off by the Trainer, you can override the Trainer's mapping of the SoP's by following the screenshots below:

The screenshot shows a web interface titled "Criteria" with a "Hide Descriptions" link in the top right. Below the title is a "Tick boxes to:" section with a dropdown menu currently set to "Sample checked criteria". A green callout box with a white arrow points to the dropdown, containing the text "1 Change the dropdown to 'accept checked criteria'". To the right of the dropdown is a "Select:" button with "All" and "None" options. Below this is a table with two sections: "[Outcome 01] Knowledge" and "[Outcome 02] Competency". Each section has a "Standards of Proficiency" column and a list of checkboxes with descriptions. In the "Knowledge" section, three checkboxes are checked and turned red: "[SoP 2.10] - Understand and apply legislation, policies and guidance relevant to their profession and scope of practice", "[SoP 2.4] - Understand what is required of them by the Health and Care Professions Council, including but not limited to the Standards of conduct, performance and ethics", and "[SoP 2.8] - Understand the importance of capacity in the context of delivering care and treatment". In the "Competency" section, two checkboxes are checked and turned red: "[SoP 1.1] - Identify the limits of their practice and when to seek advice or refer to another professional or service" and "[SoP 2.12] - Demonstrate awareness of the British, European and International Standards that govern and affect pathology laboratory practice". A second green callout box with a white arrow points to the checked checkboxes, containing the text "2 Check any/all of the SoP's you accept".

The criteria you tick (to accept as met) will turn red

If there are points you wish to raise with the Candidate/Trainer during the verification, make a separate note of these, or include them in the Verifier report form. Don't forget that the Verifier report form must include comments about the evidence submitted for each module – see section: 2.4 (p.15) for further information.

If you cannot confidently sign-off the module until the verification itself, DO NOT click any of the buttons in the "Internal Verifier (Invisible to Candidates)" section, instead scroll to the bottom of the page and click **Save & Quit** WITHOUT TICKING YOUR SIGNATURE BOX. This will save your mapping and close this piece of evidence. You will be returned back to the Unit Summary screen and the OneFile reference for the evidence you have just been scrutinising will remain blue.

OPTION: 3

If the evidence is insufficient and does not map to the SoP's, the evidence should be resubmitted back to the Trainer, with comments outlining what additional evidence/work is required for the Candidate to meet the required standard:

Criteria Hide Descriptions

Tick boxes to: Sample checked criteria Choose a selection mode... Sample checked criteria Accept checked criteria elopment Select: All None

[Section 1 - Modul...]

[Outcome 01] Knowledge

Standards of Proficiency

- [SoP 2.10] - Understand and apply legislation, policies and guidance relevant to their profession and scope of practice
- [SoP 2.4] - Understand what is required of them by the Health and Care Professions Council, including but not limited to the Standards of conduct, performance and ethics
- [SoP 2.8] - Understand the importance of capacity in the context of delivering care and treatment
- [SoP 2.9] - Understand the scope of a professional duty of care and exercise that duty

[Outcome 02] Competency

Standards of Proficiency

- [SoP 1.1] - Identify the limits of their practice and when to seek advice or refer to another professional or service
- [SoP 1.3] - Keep their skills and knowledge up to date and understand the importance of continuing professional development throughout their career
- [SoP 2.1] - Maintain high standards of personal and professional conduct
- [SoP 2.12] - Demonstrate awareness of the British, European and International Standards that govern and affect pathology laboratory practice
- [SoP 2.2] - Promote and protect the service user's interests at all times

The criteria you tick (to accept) will turn red

Scroll to the “Feedback and Comments” section. OneFile will not allow you to reject a piece of evidence without providing feedback to explain this. Feedback you provide here will be visible to all parties who have access to the Candidate’s portfolio, **including the Candidate**. Ensure the **Trainer’s name is selected**, as they will be required to unlock the submission before the Candidate can make any adjustment(s) to the submission.

Feedback to Jim Taylor (for testing) (Trainer)

1 Change the dropdown to the Trainer's name

"Times Ne... Normal 16px A B I U abc

Words: 0 Characters: 0

Create task to acknowledge this feedback

Do NOT press this button Send Now

Scroll down to the section titled “Internal Verifier” and click the **Resubmit** radio button. Ensure you check the box for submission against the module in question (it will be the only one available) and choose the “Unlock Unit” radio button.

Internal Verifier (invisible to Candidate)

Assessment decision:

Accept

Resubmit - Send back to Trainer

Resubmit against Section 1 - Module 1 (Unit needs resubmitting or unlocking)

Unlock Unit

Resubmit Unit

Assessment judgements:

Safe Fair Valid Reliable

Scroll to the bottom of the page and tick your signature box. Click **Save & Quit** to exit this piece of evidence and return to the Unit Summary. The submission has now been unlocked back to the Trainer so that further guidance can be provided to the Candidate and the submission can be altered. The Trainer will have received your feedback as a task and message and so will be able to action this with their Candidate.

Rejecting and unlocking a unit back to the Trainer means that OneFile will not allow you to sample any further evidence in that module until the unit has been signed-off by the Candidate and Trainer.

Notice in the screenshot below that the sign-off date for the module sent for re-submission (Section 1 : Module 1) has been removed, even though other evidence in that module has been sampled.

Candidate Name ▲	Started	Section 1 - Module 1	Section 1 - Module 2	Section 1 - Module 3
Taylor (for testing), Jim	10/10/2023	Unplanned Sampled MER CCR	29/02/2024 Unplanned Sampled MER CCR CCR	29/02/2024 Unplanned Sampled MER CCR CCR

You may decide to allow the Trainer and Candidate to resubmit the evidence in advance of the verification visit, in which case ask the Trainer to contact you when they have undertaken the revisions with the Candidate and signed-off the module again. It will then appear in your sampling table with the new sign-off date and should be scrutinised as any other piece of evidence.

2.4 The Verifier Report Form

The verification report form can be started at any time in advance of the verification visit. We recommend starting the Verifier report form during the process of evidence verification (see section: 2.3, p.8) and using the draft form as a repository for notes and potential verification questions.

2.4.1 Create a new instance of the Verifier Report Form

Each Verifier report form is created as a separate instance, which is effectively a copy of the form. In most cases, where verification of the Candidate is successful at the first attempt, only one instance of the form will exist. In situations where a re-verification is being performed, a new (second) instance of the form will be created so that the original verification form remains unaltered.

1. From the Unit Sampling table (see section: 2.2.1 p.7), navigate to the Candidate's portfolio

VERIFIER Unit Sampling Table (1) Candidate selection: Single-mode Zoom table: - +

Simple Planned Sample with Anticipated Completion Dates Actual Sample with Unit Signed Off Dates
 Advanced Show Pending Unit Rejections Show Assessment Processes

Candidate Name ▲	Started	Section 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5	Section 2 - Module 1	Section 2 - Module 2	Section 2 - Module 3	Section 2 - Module 4	Section 2 - Module 5
Taylor (for testing), Jim	10/10/2024	24/02/2024	24/02/2024	24/02/2024			24/02/2024	24/02/2024	24/02/2024

Assessment Methods: APL APL CCR Candidate Choice MER Mandatory Evidence

Planning & Sampling: [R] Pending unit rejection [FP] Formative Planning [FS] Formative Sampling [SS] Summative Sampling

Centre Specific VERIFIER Processes

2. Click the “Verifier Report Form” button to access the digital form.

The Verifier report form can be found in the “Forms” tab of the Information and Options section of the Candidate's portfolio. We recommend right-clicking on this button and opening the Verifier report form in a new tab, so that information can be added to the form during the verification of the portfolio evidence.

Information & Options

Learning Aim	Current Progress	Target Progress	
Registration Training Portfolio (V5)	100%	68%	▼

Overall Progress: 100% Laboratory: Default Laboratory Candidate Status: None

0 Pending

View pending and completed Training Plans

Tip

0 Pending

View pending and completed assessments

Assessments

None scheduled

View candidate progress progress reviews

Progress Reviews

Activity | Manage | Progress | **Forms**

Verifier Report Form

- Click “create new instance”. If this button is not visible, ensure that the “Form” drop-down list is NOT set to “all forms”

Instances

Form: Verifier Report Form Date from: Date to:

Create new instance

There are no instances to display

- The “New instance” pop-up box suggests a name for the form. We recommend accepting the default name by clicking “Create”

New Instance

Name:

Jim Taylor (for testing) - Verifier Report Form - 20/02/2024

Create Cancel

2.4.2 Completing the Verifier report form

The Verifier report form has been restructured from previous versions of the Registration Training Portfolio. The new Verifier report form contains six sections:

1. Scrutiny of portfolio evidence
2. Informal interview with Candidate
3. Laboratory tour
4. Training environment
5. Summary feedback comments for the verification
6. Verification Outcome

The Verifier report form can be started at any time in advance of the actual verification meeting/visit and saved for final sign-off at a later date. Points to note for completion of the Verifier report form:

- Feedback on each module should be provided as detailed in section: 2.3 (p.8).
- The process of conducting the review of the portfolio evidence and the verification is the same, regardless of whether the verification is conducted virtually or in-person.
- All users (Trainers, observers etc.) associated with this Candidate can see the completed Verifier report form, but only **AFTER** it has been signed-off by the Verifier, Trainer and Candidate.
- Check boxes are confirmatory. i.e. placing a check in a box confirms you agree with the statement. If you cannot tick to confirm the statement, this **DOES NOT** automatically mean that the Candidate fails the verification.
- If you cannot confirm the statement associated with a check box, please provide context to explain why in the relevant “additional information” section.
- **Pass/fail decisions of the Candidate at verification are at the sole discretion of the Verifier.**

2.5 The Verification visit/meeting

During the verification meeting, the Candidate and the Verifier will both need access to the portfolio on OneFile.

The Verifier should have the Verifier report form open in OneFile in order to use the notes they made during their scrutiny of the evidence. To navigate to the partially completed report form:

1. From the Unit Sampling table (see section: 2.2.1 p.7), navigate to the Candidate's portfolio

VERIFIER Unit Sampling Table (1) Candidate selection: Single-mode Zoom table: - +

Simple Planned Sample with Anticipated Completion Dates Actual Sample with Unit Signed Off Dates
 Advanced Show Pending Unit Rejections Show Assessment Processes

Candidate Name ▲	Started	Section 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5	Section 2 - Module 1	Section 2 - Module 2	Section 2 - Module 3	Section 2 - Module 4	Section 2 - Module 5
Taylor (for testing) jim	10/10/2024	24/02/2024	24/02/2024	24/02/2024	24/02/2024		24/02/2024	24/02/2024	24/02/2024

Assessment Methods
 APL APL CCR Candidate Choice MER Mandatory Evidence

Planning & Sampling
 [RJ] Pending unit rejection [FP] Formative Planning [FS] Formative Sampling [SS] Summative Sampling

Centre Specific VERIFIER Processes

2. Click the “Verifier Report Form” button to access the digital form.

The Verifier report form can be found in the “Forms” tab of the Information and Options section of the Candidate's portfolio. We recommend right-clicking on this button and opening the Verifier report form in a new tab, so that information can be added to the form during the verification of the portfolio evidence.

If you have started the Verifier report form during your scrutiny of the evidence as outlined in section: 2.3 (p.8), the Verifier report form label will include the suffix “(1 pending)”.

Activity Manage Progress Forms

Verifier Report Form (1 Pending)

Open the existing instance of the Verifier report form by clicking the “open” button to the right of the form entry in the table.

If this is a re-verification following a previously unsuccessful outcome, you will be able to open the previous instance of the form and review the comments left during that verification. However, previous versions of the form are NOT editable once signed-off.

Form: Verifier Report Form Date from: Date to:

Create new instance

Form Name	Candidate Name	Instance Name	Date Created	Date Modified	Signatures	Options
Verifier Report Form	Jim Taylor (for testing)	Jim Taylor (for testing) - Verifier Report Form - 29/02/2024	29/02/2024 13:26:45	29/02/2024 13:26:45	■■■■	Open

3. Conduct the verification visit/meeting drawing your questions from the comments you have provided against each module in section 1 of the Verifier report form.

NB: For SoP's you were unable to verify during your independent scrutiny of the evidence in the portfolio, please include comments in the Verifier report form to show that you have satisfied yourself that the SoP has been addressed during the verification itself. After the verification, you will need to navigate back to the relevant evidence to confirm the SoP is now accepted. To do this, refer to section 2.3.2 (p.10) and follow “option: A” to confirm All SoP's have been addressed and then accept the evidence as complete.

4. You should confirm the statements in sections 2-5 of the Verifier report form. Please provide as much detail as practicable in terms of the content and discussion that takes place during the verification.

Check boxes are confirmatory. i.e. placing a check in a box confirms you agree with the statement. If you cannot tick to confirm the statement, this **DOES NOT** automatically mean that the Candidate fails the verification but please provide feedback to explain why you cannot confirm any specific point.

5. It is only necessary to provide feedback in section six of the Verifier Report Form if you **CANNOT** recommend award of the Certificate of Competence, or ongoing training approval of the laboratory.

Pass/fail decisions of the Candidate at verification are at the sole discretion of the Verifier's professional judgement.

6. When you have completed the Verifier report form, tick the box in your signature strip to confirm your decision and then click “Save”. The page will refresh, showing that your comments have been locked into the form. You can now click “Cancel”.

7. The verification outcome (successful/unsuccessful) determines what action now needs to be taken by the Verifier. See section 2.6 (overleaf) for further guidance.

2.6 Verification Outcomes – Verifier

2.6.1 After the verification visit – all cases

After the verification meeting/visit, the Verifier must finalise and sign-off the Verifier report form in accordance with the previous sections of this guide. Any SoP's which were not met by the initial evidence but were covered satisfactorily during the verification should be updated and signed-off in their relevant module. See section 2.3.2 (p.10) for information on signing-off SoP's on individual pieces of evidence.

Once the Verifier has signed-off the report form, it will be sent to the Trainer and Candidate (each in turn) for them to view and accept that the process has been completed as described in the report. Each of the signature boxes associated with the report form will turn green as the respective party signs-off the form.

Form Name	Candidate Name	Instance Name	Date Created	Date Modified	Signatures	Options
Verifier Report Form	Jim Taylor (for testing)	Jim Taylor (for testing) - Verifier Report Form - 29/02/2024	29/02/2024 13:26:45	29/02/2024 13:42:28		

NB: Sign-off of the Verifier report form needs to be completed irrespective of the verification outcome.

The final signature on the form will be provided by the IBMS when the paperwork is in order and the outcome formally accepted by the institute. You DO NOT need to wait for all signatures on this form in order to finalise and sign-off the portfolio.

If the verification is successful – go to section: 2.6.2 (p.21)

If the verification is not successful – go to section: 2.6.3 (p.24)

2.6.2 If the verification is successful

1. From the Verifier Home page, click the **Unit Sampling** button on the left-hand menu. This will open a page with a “unit sampling table”.
2. Ensure your name is highlighted in the “Select a Verifier” section, then click “submit” on the right-hand side of this box (leaving all other values unchanged). The “Verifier Unit Sampling table will open, which lists the Candidate(s) currently assigned to you for verification. You will now see that all the modules show the evidence has been verified. You should check that each module shows:
 - One box, labelled MER

- Two boxes labelled CCR

This arrangement confirms that the Mandatory evidence (MER) and Candidate choice evidence (CCR) for the module have been sampled and the SoP's accepted.

VERIFIER Unit Sampling Table (1) Candidate selection: Single-mode Zoom table: - +

Simple
 Planned Sample with Anticipated Completion Dates
 Actual Sample with Unit Signed Off Dates
 Advanced
 Show Pending Unit Rejections
 Show Assessment Processes

Candidate Name ▲	Started	Section 1 - Module 1	Section 1 - Module 2	Section 1 - Module 3	Section 1 - Module 4	Section 1 - Module 5
Taylor (for testing), Jim	10/10/2023	29/02/2024 Unplanned Sampled MER CCR CCR	29/02/2024 Unplanned Sampled MER CCR CCR	29/02/2024 Unplanned Sampled MER CCR CCR	29/02/2024 Unplanned Sampled MER CCR CCR	29/02/2024 Unplanned Sampled MER CCR CCR

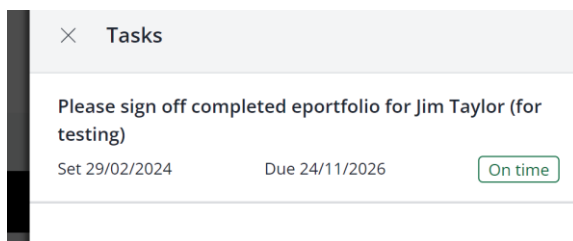
Assessment Methods

APL APL
 CCR Candidate Choice
 MER Mandatory Evidence

NB: The screenshot above only shows section 1 of the portfolio for demonstration purposes. In most cases, all ten portfolio modules will be listed in this table.

If necessary, click into the relevant module to sign-off the outstanding SoP's as described in previous sections, to ensure that each module shows all three pieces of evidence have been verified and the related SoP's met (either in the evidence or during the verification visit/meeting).

- Once all SoP's have been sampled and accepted, you will receive a task in your Task list asking you to sign-off the completed portfolio for the specific Candidate.



- Click into the task; at the top of the screen is another representation of the progress against each module (not shown on screenshot below). Scroll to the bottom of the screen, add any final feedback you wish to provide (this feedback is optional).

5. Tick your box in the signature strip to confirm that the portfolio is complete and you recommend award of the Certificate of Competence. Then, click “Save”.

Summative Comments & Declarations (visible to managers and verifiers only)

Internal Verifier Summative Comments

External Verifier Summative Comments

No comments provided

I confirm that the above learning aim has been completed and....

Name	Signed	Date
Jim Taylor (for testing) (Internal Verifier)	<input type="checkbox"/>	29/02/2024 16:57:04
External Verifier	<input type="checkbox"/>	

[Save](#)

The portfolio has now been marked as completed. This will convert everything to ‘read only’ access in the portfolio, but the Verifier Report Form, Laboratory Feedback form and confidential Candidate feedback form will remain live.

The verification is complete and the IBMS will perform final checks and issue the certificate of competence.

2.6.3 If the verification is not successful

If the verification is not successful, please provide feedback in section: 6 of the Verifier report form to outline the reason(s) for not being able to successfully verify the Candidate.

Feedback should be objective and evidence-based, and the reason for being unable to confirm a positive outcome should be discussed with the Trainer and Candidate. If appropriate, an agreement should be reached on the work required to meet the necessary standard.

If it is deemed appropriate to simply ask for additional evidence (with or without another verification/partial verification), the Verifier will need to reject the module(s) in question as outlined in option: 3 of section: 2.3.2 (p.13) and ask the Trainer to resubmit the tasks back to the Candidate in order for the additional work to be done.

Once the additional work has been completed:

1. The Trainer should sign-off the work in the normal manner and contact the Verifier to confirm when this has been done.
2. The Verifier should re-sample the evidence as described in section: 2.3 (p.8), to determine whether it meets the required criteria.
 - **If it is NOT necessary to hold another verification meeting:** the evidence should be accepted as outlined in section: 2.3.2 option: 1 (p.11) and the portfolio can now be signed-off as a successful verification. See section: 2.6.2 (p.21) for signing-off a successful portfolio.
 - **If a re-verification meeting is required:** the re-verification should be arranged and the normal process for verification conducted. A new instance of the Verifier Report Form should be initiated, but it is only necessary to include information concerning the changes/improvements since the previous verification.

Unsuccessful verifications can be difficult to address, so please contact the IBMS Education team if you need further advice or guidance on how to address this situation: registration@ibms.org

3 Information for Trainers/Managers

3.1 In advance of the verification visit/meeting

The Verifier will have immediate access to the full Candidate portfolio as soon as they have been assigned, therefore in advance of lodging an application for verification, please ensure that:

- **Each piece of evidence has been signed-off by the relevant Trainer**

The green progress bar for each module fills the progress tracker (100%)

- **Each module has been signed-off by the Trainer and the Candidate**

When signed-off at the module level, the green progress bar has the words “Candidate”, “Trainer” and “Verifier” within it, confirming that the module has been signed-off and is awaiting verification.

3.1.1 Applying for Registration Training Portfolio Verification

In the first instance, applications for verification will be processed and administered in the same way as previous (non-digital) versions of the registration portfolio.

The IBMS will issue further guidance on how to apply for verification digitally, when the process has been implemented.

3.1.2 Liaising with the Verifier

The process map at the front of this guide (section: 1, p.4) shows that the Verifier should initiate contact with the Trainer to organise the verification. It is the Candidate’s choice whether the verification is conducted in-person or virtually, and appropriate arrangements should be made via e-mail or the OneFile messaging system.

3.2 On the day of verification

It is likely (but NOT a requirement) that the Verifier will have reviewed the evidence in the Candidate's portfolio in advance of the verification. The verification meeting/visit is predominantly to ensure the Candidate's ability to demonstrate their knowledge and competence against the SoP's mapped to the evidence in their portfolio and for the Verifier to confirm that the threshold standards for award of the Certificate of Competence have been met.

On the day of verification, the Trainer should ensure that:

- **For virtual verifications:**
 - Teams/Zoom calls have been scheduled as appropriate and everyone notified in sufficient time
 - The Candidate has access to a laptop/PC in order to complete the verification
 - Provision has been made for the laboratory tour / video walkthrough to be undertaken without the presence of the Trainer

- **For an in-person verification:**
 - The Verifier has access to a PC/laptop during the visit in order to review the Candidate's portfolio and discuss the portfolio with the Candidate during the visit.
 - The Candidate has access to a laptop to navigate through their portfolio in order to help them answering questions about the evidence it contains

3.2.1 After the verification visit/meeting has finished, the Trainer must:

- Agree the outcome of the verification with the Verifier. NB: the Verifier has sole discretion for a pass/fail outcome
- Ask the Candidate to complete the confidential Verification feedback form in OneFile (see section: 4.3 p.30)
- Complete and submit the laboratory feedback form (see section: 3.2.2 overleaf)
- Sign (via OneFile) the completed Verifier Report Form to confirm they accept this as a true account of the process that took place.

3.2.2 Completing the Laboratory feedback Form

1. The Laboratory feedback form can be found in the “Forms” tab of the Information and Options section of the Candidate’s portfolio.

Information & Options

Learning Aim	Current Progress	Target Progress	
Registration Training Portfolio (V5)	100%	68%	▼

Overall Progress: 100% Laboratory: Default Laboratory Candidate Status: None

0 Pending 0 Pending None scheduled

View pending and completed Training Plans View pending and completed assessments View candidate progress progress reviews

Activity Manage Progress **Forms**

Laboratory Feedback Form Report m

2. Create a new instance of the Laboratory feedback form, if you cannot see the “create new instance” button, ensure that the Form drop-down list is NOT set to “all forms”

Instances

Form: Verifier Report Form Date from: Date to:

Create new instance

There are no instances to display

The “New instance” pop-up box suggests a name for the form. We recommend accepting the default name by clicking “Create”

New Instance

Name: Jim Taylor (for testing) - Laboratory Feedback Form - 20/02/2024

Create Cancel

3. You are now presented with the new Laboratory feedback form, which contains three sections:
 - Pre-verification – collects information about making the arrangements for verification
 - Day of verification – confirmation that the Trainer agrees a fair and due process
 - Post-verification – feedback on the verification, the process and the institute.

The Laboratory feedback form can be started in advance of the actual verification event and saved for completion and final sign-off at a later date.

The laboratory feedback form **MUST** be received by the IBMS before the Certificate of Competence will be issued to the Candidate.

Additional points for the completion of the laboratory feedback form

- All users associated with this Candidate can see the completed laboratory feedback form.
- **Pass/fail decisions of the Candidate at verification are at the sole discretion of the Verifier.**

4 Information for Candidates

4.1 Before the verification

Most of the hard work for your Registration Training Portfolio will be completed before the verification. The purpose of the verification is for you to provide additional context and to demonstrate your understanding of the SoP's required for the IBMS to award the Certificate of Competence. Your Trainer should help with your preparation for verification, but it is important to double-check that you have completed all of your tasks/actions within OneFile.

To confirm that everything has been signed-off and your portfolio is ready for verification:

4. Navigate to your portfolio to double-check that everything has been signed-off. The easy check is that your green progress bar (or the progress clock on your dashboard) should indicate 100%
 - The green progress bar should indicate 100%. If this is not the case, the completed portfolio has not been signed-off by either you or your Trainer; you should check your task list (including tasks you may have hidden) to ensure that you haven't missed a signature. Clicking through into the portfolio should .
 - The red target progress may or may not indicate 100% completion – this is an automated parameter based on the assessment dates set by your Trainer and the anticipated portfolio completion date.
5. From the “Information and options” section of your portfolio, click the “100%” link in the Current progress column

The screenshot shows the 'Information & Options' section of a portfolio. At the top, there is a table with three columns: 'Learning Aim', 'Current Progress', and 'Target Progress'. The 'Learning Aim' is 'Registration Training Portfolio (V5)'. The 'Current Progress' is '100%' and the 'Target Progress' is '68%'. The '100%' is highlighted with a red box. Below the table, there are three cards: 'Tp' (0 Pending), 'Assessments' (0 Pending), and 'Progress Reviews' (None scheduled). At the bottom, there is a row of six icons: 'Activity', 'Assessment Evidence', 'Learning Journal', 'Notes (0)', 'Tasks (0)', and 'Timesheet'.

6. Check that all modules have been signed-off by yourself and your Trainer(s)

Module sign-off will be indicated by all modules having a complete green bar containing the words “Trainer”, “Candidate” and “IV” – this confirms that all requirements have been met for module sign-off. You are now ready for verification!

Overall Progress: 100% Include pending assessments Show detailed view

Registration Training Portfolio (V5)	Unit Progress			Actual
Section 1 - Module 1	TRAINER	CANDIDATE	IV	100%
Section 1 - Module 2	TRAINER	CANDIDATE	IV	100%
Section 1 - Module 3	TRAINER	CANDIDATE	IV	100%
Section 1 - Module 4	TRAINER	CANDIDATE	IV	100%
Section 1 - Module 5	TRAINER	CANDIDATE	IV	100%
Section 2 - Module 1	TRAINER	CANDIDATE	IV	100%
Section 2 - Module 2	TRAINER	CANDIDATE	IV	100%
Section 2 - Module 3	TRAINER	CANDIDATE	IV	100%
Section 2 - Module 4	TRAINER	CANDIDATE	IV	100%
Section 2 - Module 5	TRAINER	CANDIDATE	IV	100%
Verification	TRAINER	CANDIDATE	IV	100%

4.2 During the verification

During the verification, you should have access to a PC/laptop and be in a quiet room, with no distractions. Follow the guidance of your Trainer regarding the arrangements for the verification visit/meeting itself.

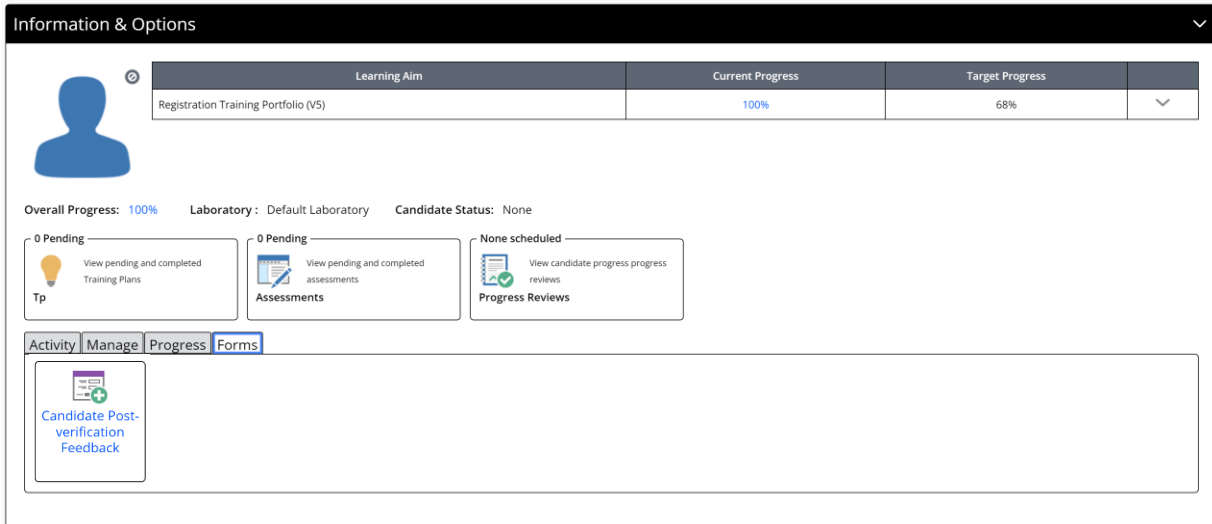
4.3 After the verification

After your verification, you need to:

- Sign the Verifier report form (via OneFile task) – this may be a few days after the verification
- Sign the Laboratory Feedback form (via OneFile task) – this may be a few days after verification
- Complete the Candidate feedback form, which collects information about:
 - Your experience of the verification
 - Feedback you might want to provide in confidence, that neither your Trainer(s) nor the Verifier will see

4.3.1 To complete the Candidate feedback form:

1. Navigate to the “Candidate post-verification feedback” form to access the digital form, which can be found in the “Forms” tab of the Information and Options section of your portfolio.

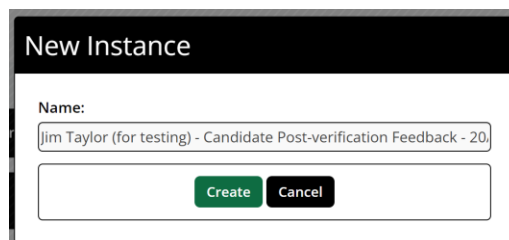


2. Create a new instance of the Candidate post-verification feedback form

If you cannot see the “create new instance” button, ensure that the Form drop-down list is NOT set to “all forms”



The “New instance” pop-up box suggests a name for the form. We recommend accepting the default name by clicking “Create”



7. You are now presented with the new Candidate post-verification feedback form, which contains two sections:

5. Complete the form, providing an evaluation of your training as appropriate, tick the box to confirm your signature and then press send!

Additional points for the completion of the Candidate post-verification feedback form

- Only yourself and the IBMS can see this form, so your feedback is confidential
 - **Pass/fail decisions regarding your verification are at the sole discretion of the Verifier.**
6. Ensure you sign the Verifier Report form and Laboratory feedback form (when presented as a task in OneFile), to confirm that you accept the information contained in these documents.

Your verification is complete! The IBMS and your Verifier/Trainer may be in touch to confirm any relevant details or information. Once the IBMS receive confirmation (via OneFile) of a successful verification, we will archive your portfolio, which converts it to a read-only state. If you wish to download a pdf copy of your portfolio, see the next section (overleaf).

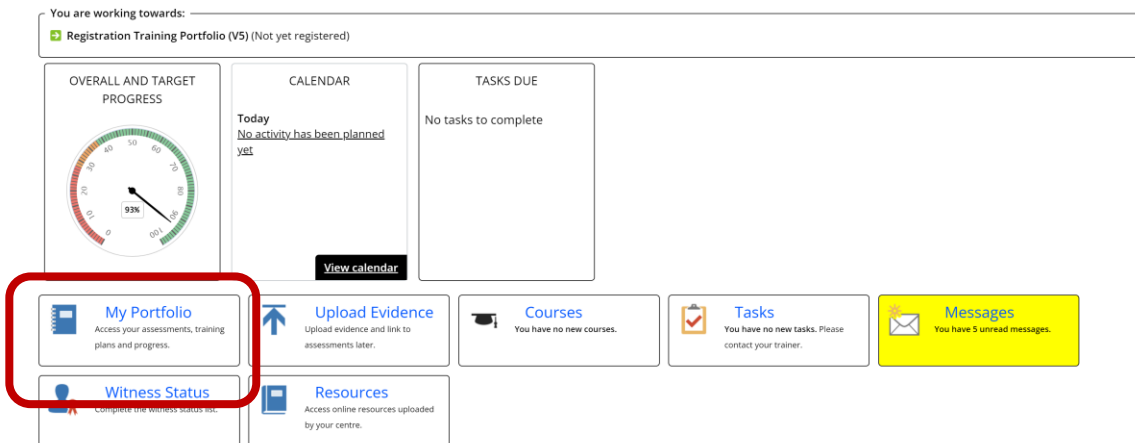
4.3.2 Do

4.3.3 Downloading a copy of your portfolio:

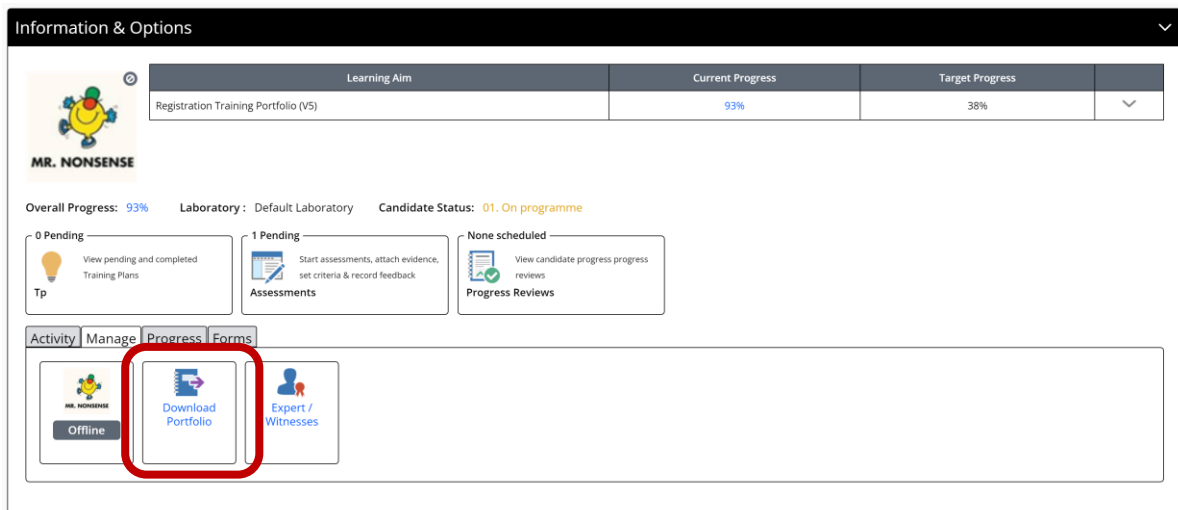
You will have perpetual access to your portfolio directly through OneFile – this is why we recommended setting-up your portfolio with a personal e-mail address, to give you the best chance of long-term access, independently of where you might work (and therefore this will protect you against workplace changes in e-mail address).

In addition to perpetual access via OneFile, you can download a pdf of your portfolio as follows:

1. From your portfolio homepage, click “My portfolio”



2. In the information and options section, click “Download portfolio”



Make sure you tick the box to include file attachments, take note of the other information provided on the screen and then click “Request new download”.