RECORD OF LABORATORY TRAINING FOR THE IBMS SPECIALIST DIPLOMA

RAPID ONSITE EVALUATION

IBMS Institute of Biomedical Science

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London
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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 Portfolio Awarded:
Date Specialist ROSE Training Commenced:
Name of Training Officer:

Confirmation of Completed Training		
Date Training Completed	Training Officer's Signature	Candidate's Signature

Recommendation for Award of Specialist Certificate		
Date of External 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

Contents

1. INTRODUCTION

In order to select the ROSE module individuals must already hold a specialist diploma qualification and be a member of the Institute of Biomedical Science (IBMS). This module is available to individuals wishing to extend their knowledge and skills to accommodate the integration of on-site clinical skills.

1.2 Applicants for this module must, as a minimum requirement, hold a specialist diploma qualification and IBMS membership class of Member (MIBMS) and be working in a laboratory with Institute approval for post-registration training. It is not available to Associate members of the Institute or individuals undertaking pre-registration training.

1.3 The ROSE module does not confer eligibility for the award of a Specialist Diploma in its own right.

2. APPLICATION

Candidates who are already qualified and experienced at or above the specialist level are eligible to take this module and must complete the optional module application form. The ROSE module is issued on receipt of payment and acceptance of the application by the IBMS. The fee is inclusive of the end-point assessment.

3. COMPLETING THE ROSE MODULE

3.1 Each section of this module requires the candidate to demonstrate knowledge and competence of their practice. If the candidates' employing laboratory does not undertake all of the prescribed rapid on-site techniques and does not employ individuals with the knowledge and experience to deliver all of the necessary training, there may need to be an arrangement with another laboratory to provide the required additional training experience. However, it is expected that candidates undertaking this module can carry out the majority in their own place of work.

3.2 To support completion of this module a separate guidance document has been produced (Institute of Biomedical Science Specialist Portfolio Guidance for Candidates, Training Officers and External Examiners). The ROSE module will be completed in accordance with current guidance for completion of the specialist portfolios.

3.3 The training review sheet on page 2 must be completed as evidence of structured training.

4. COMPLETION TIME

4.1 Candidates taking the ROSE module should expect to complete it within 12 months. While there is currently no time limit for completion of the module there is a requirement for evidence to be relevant to the candidate's current practice, i.e. within two years of the end-point assessment. Evidence older than two years should not be included unless, in exceptional circumstances, relevance can be confirmed by the trainer. When the candidate is ready for external examination an application must be submitted to the IBMS by the trainer or laboratory manager.

4.2 Candidates are expected to meet the following learning outcomes adapted from the guidance document for Specialist Portfolios.

Knowledge and understanding

The successful candidate will be able to:

a. Demonstrate knowledge and understanding of the scientific and technical aspects of rapid on-site evaluation including: correct procedures for handling specimens before, during and after sampling; transport and maintenance of routine equipment; principles of quality control/assurance procedures and good communication.

b. Demonstrate knowledge and understanding of the scientific basis of the disease process under investigation and the recommended ancillary testing.

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

a. Competently perform ROSE without immediate supervision.

b. Demonstrate self-direction in solving problems and exercising personal autonomy in relation to scope of practice.

c. Demonstrate a systematic application of professional knowledge and understanding in the interpretation of stained material, to determine action based on best practice.

These are evidenced by the in-house assessments of training and portfolio of evidence

Transferable skills

a. Demonstrate the ability to critically reflect in order to inform best practice. This is evidenced by personal reflective statements.

5. END-POINT ASSESSMENT

5.1. On completion of training and in accordance with the requirements of the specialist module, your employer should apply to the Institute for the appointment of an external examiner.

5.2. Accompanying the portfolio should be a signed statement from the laboratory manager testifying to the ROSE that you undertake in your own laboratory. This will be used by the external examiner to guide the areas for questioning. Please note the external examiner can ask questions on any of the units in the record of training and your portfolio of evidence.

5.3. The external examiner will determine your suitability for the award of this Specialist Portfolio module by assessing your knowledge and understanding of your specialty through: the oral presentation; the evidence of training you have provided and questions asked during the tour.

5.4. Your presentations should not be overcomplicated and slides should be kept simple: they are really a prompt to give your talk a structure. You are talking about things you know: how you gained your experience, key aspects of your work, recent developments that may have occurred, or are planned and any particular interests you have. The external examiner may also wish to ask some questions related to the presentation or seek points of clarification.

5.5. Your portfolio of evidence will provide the examiner with an opportunity to assess the quality of your training (e.g. through the questions asked by the trainer) and your understanding of the techniques (e.g. annotated evidence, witness statements, reflective statements).

5.6. During the clinic tour with *viva voce* the external examiner will not assess your practical competence; this is 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 any ROSE performed outside of the department. Questions may include references to equipment in use, samples that are being processed, investigative techniques being performed, quality control, results and health and safety.

5.7. After this you will be informed of the outcome (Pass or Fail) and verbal feedback will be provided by the examiner. If you have not been successful the examiner will provide more detailed written feedback explaining the reason(s) 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 candidate, training officer and examiner to address any shortfalls. A subsequent full or partial examination will be required and this must be arranged through the IBMS.

6. COMPLETION OF REPORTS AND AWARD

6.1. Check with your trainer that they have submitted the feedback report form to the Institute. Both the external examiner and the laboratory trainer are required to submit reports, and delays in this part of the process will delay the award of your Specialist Portfolio module.

6.2. Once the reports have been received the Institute will issue your certificate.

Section 7:
Rapid On-Site Evaluation

This section covers the range of procedures and diagnostic cytopathology techniques that have been identified as being most relevant to practice as a specialist biomedical scientist working in a ROSE clinic setting.

Candidates completing this section are expected to be able to demonstrate the application of knowledge and skill defined in section 2 of this portfolio.

It is expected that candidates completing this section will undertake the majority of this work in their own hospital however if some of these clinics are not performed in their own place of work off site training is acceptable to achieve the level of knowledge and understanding required.

There may be other clinics that the training laboratory include in their repertoire and therefore requires the individual to be competent in. These can be recorded in the reflective log at the end of each sub-section.

Section 7 - Rapid On-Site Evaluation

Unit 7.1 Principles of FNA and ROSE

KNOWLEDGE

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

1. Theory of fine-needle aspiration (FNA) techniques in superficial sites and utilising imaging techniques.
2. Range of sites most commonly sampled.
3. Advantages and disadvantages of rapid on-site evaluation (ROSE).
4. How ROSE fits into the overall pathway for diagnosis in the relevant specialities
5. Specimen adequacy (ensuring there is sufficient diagnostic material for all the tests required)
6. Methods of improving adequacy
7. Relevant triage of the specimen depending on the initial assessment

COMPETENCE

Be able to:

a. Understand the criteria for adequacy from a variety of sites
b. Answer the clinical question
c. Understand the descriptive terminology used to describe the clinical and/or radiological appearances of abnormal areas
d. Suggest ways of improving the adequacy of samples
e. Triage the sample

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7. 2 Core Medical Principles

KNOWLEDGE

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

1. Commonly used investigations of which FNA with ROSE may be a part, such as imaging (Ultrasound, CT, PET, MRI and plain X-ray), microbiology and/or biochemistry
2. Principles of staging malignant disease
3. The impact of investigations and staging on treatment decisions for malignant, non-malignant and non-neoplastic disease

COMPETENCE

Be able to:

a. Discuss the types of imaging investigations used in the diagnosis of the relevant disease
b. Name and explain the microbiological and biochemical investigations used in the diagnosis of relevant disease
c. Describe the TNM staging and other schemes used for cancer staging
d. Discuss how these investigations and staging provide the basis for treatment decisions

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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:

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One other piece of evidence chosen by the candidate as an example of their competence in this area.

Date of completion:

Trainer's name:

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Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.3 Communication

KNOWLEDGE

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

1. Importance of communication with clinical teams
    - Pre procedure
    - During procedure
    - Post procedure
2. Importance of communication with patient
    - Pre procedure
    - During procedure
    - Post procedure
3. Conduct at clinic and understanding of limitations (BMS and/or pathologist)
4. Importance of Consent
5. Importance of Information Governance

COMPETENCE

You must be able to:

a. Explain the importance of communication for both planned and ad-hoc procedures
b. Demonstrate communicating effectively with a clinical team
c. Describe the methods of consent used within your speciality area
d. Discuss the use of terminology within the clinic setting
e. Provide evidence of your mandatory IG training

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 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 trainer on the knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.4 Equipment, Reagents & Consumables

KNOWLEDGE

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

- Equipment required for ROSE in a clinical setting
- Reagents and consumables required for ROSE dependent on site sampled
- Requirements for on-site and off-site ROSE
- Requirements for quality control of reagents and consumables
- Transport of equipment and consumables

COMPETENCE

Be able to:

a. Describe the equipment, reagents and consumables required for ROSE
b. Select appropriate quality control material and carry out IQC of staining
c. Set up a clinical area for ROSE
d. Describe the transport arrangements required for both on-site and off-site ROSE clinics

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.5 Health & Safety in a clinical environment

KNOWLEDGE

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

1. Potential hazards in regards to
    - Infectious agents
    - Modes of infection
    - Hazardous substances
    - Sharps injuries
2. Potential for adverse events during procedures
    - Risk of adverse events
    - Support and learning following an adverse event
3. Transport of samples from the clinic

COMPETENCE

Be able to:

a. Describe the potential hazards associated with ROSE in various clinic settings
b. Select the appropriate PPE for use in a variety of clinic settings
c. Discuss the documentation required following a needle stick injury
d. Describe a possible adverse event and the follow up required
e. Discuss the requirements for transporting samples from clinic to laboratory

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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:

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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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.6 Preparation Techniques

KNOWLEDGE

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

1. Preparation of slides for ROSE
2. Ability to work under pressure
3. Importance of accurate record-keeping
4. Methods of transfer of material from needle to slide
5. Awareness of appropriate stains
6. Knowledge of other media (and potential uses) for cytological material

COMPETENCE

Be able to:

a. Record the reason for the procedure and the samples taken at each site
b. Describe your choice of slide preparation
c. Discuss the need for other media and their relevance to specific procedures
d. Describe the complications that may arise during procedures to reduce the material obtain from different sites sampled

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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:

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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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.7 Ancillary Techniques

KNOWLEDGE

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

1. Immunocytochemistry
    a. Diagnostic uses
    b. Predictive uses (ALK, ROS-1, PD-L1 etc)
2. Cytogenetics and FISH
    a. Purpose
    b. Specimen requirements
3. Flow cytometry
    a. Purpose
        i. Lymphoma
        ii. Non-lymphoma
    b. Specimen requirements
4. Molecular analysis
    a. Purpose
    b. Different techniques
    c. Specimen requirements
        i. Optimum amount of fixation
        ii. Importance of volume/purity
5. Microbiological analysis
    a. Avoiding contamination with
        i. Extraneous pathogens
        ii. Microbicidal substances eg formalin
    b. Specimen requirements
6. Biochemical analysis
    a. Purpose
    b. Specimen requirements

COMPETENCE

Be able to:

a. Discuss the sample requirements for ancillary tests
b. Describe the use of ancillary techniques for relevant sites
c. Discuss the relevance of diagnostic and prognostic markers

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.8 EUS fine needle aspiration collection, assessment and preparation

KNOWLEDGE

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

1. Principles and practice of EUS (endoscopic ultrasound-guided) fine needle aspiration (FNA).
2. Anatomy, histology and histopathology of the upper gastro-intestinal tract.
3. Body sites from which EUS FNA samples are taken.
4. The different sample preparation techniques.
5. Additional ancillary techniques that may be performed on residual material such as molecular testing & flow cytometry.

COMPETENCE

Be able to:

a. Optimise specimen preparation.
b. Stain slides in accordance with standard operating procedures.
c. Undertake accurate assessment of sample adequacy.
d. Identify cell content present and assess relevance to sample site.
e. Select suitable transport media for residual specimen with reference to any additional clinical requirements for subsequent investigations where appropriate.
f. Complete all documentation in accordance with quality assurance and audit requirements.

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.9 EBUS fine needle aspiration collection, assessment and preparation

KNOWLEDGE

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

1. Principles and practice of EBUS (endobronchial ultrasound-guided) fine needle aspiration (FNA).
2. Anatomy, histology and histopathology of the respiratory tract.
3. Body sites from which EBUS FNA samples are taken.
4. The different sample preparation techniques.
5. Additional ancillary techniques that may be performed on residual material such as molecular testing & flow cytometry.

COMPETENCE

Be able to:

a. Optimise specimen preparation.
b. Stain slides in accordance with standard operating procedures.
c. Undertake accurate assessment of sample adequacy.
d. Identify cell content present and assess relevance to sample site.
e. Select suitable transport media for residual specimen with reference to any additional clinical requirements for subsequent investigations where appropriate.
f. Complete all documentation in accordance with quality assurance and audit requirements.

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Unit 7.10 Head and neck fine needle aspiration collection, assessment and preparation

KNOWLEDGE

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

1. Principles and practice of head and neck fine needle aspiration (FNA).
2. Anatomy, histology and histopathology of the head and neck appropriate to sample site collection including thyroid, salivary glands and lymph nodes.
3. Body sites from which head and neck FNA samples are taken.
4. The different sample preparation techniques.
5. Additional ancillary techniques that may be performed on residual material such as molecular testing & flow cytometry.

COMPETENCE

Be able to:

a. Optimise specimen preparation.
b. Stain slides in accordance with standard operating procedures.
c. Undertake accurate assessment of sample adequacy.
d. Identify cell content present and assess relevance to sample site.
e. Select suitable transport media for residual specimen with reference to any additional clinical requirements for subsequent investigations where appropriate.
f. Complete all documentation in accordance with quality assurance and audit requirements.

EVIDENCE OF ACHIEVEMENT

This section requires the trainer to sign 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 knowledge and skill components required to complete this unit. (Evidence to support this is 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 signature:

This is to confirm that the knowledge and competence requirements for this section and the requirements in the Evidence of Achievement section have been met.

Internal Assessor's signature:

Internal Assessor's name:

Date:

Section 7. Reflective Practice

This section is used to demonstrate that as a candidate for the award 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 Care Professions Council (HCPC).

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

Candidate's Reflective Practice Statement Part 1.

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

Section 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. As a candidate for the award 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. This is therefore an opportunity to reflect on aspects of training, the application of new knowledge and skills, and how goals have been achieved.

Personal reflection on training and examples of evidence for this section.

About this document

Document title: Record of Laboratory Training for the Specialist Diploma Diagnostic Cytopathology Module Rapid On-Site Evaluation - ROSE
Produced by: Education and Professional Standards Committee

Contact: Education Department

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