

**Cellular Pathology**  
**Trainee Biomedical Scientist**  
**Training Plan & Competency manual**

<b>Name:</b>
<b>Mentor:</b>
<b>Training officer:</b>
<b>Date:</b>

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### Corporate induction requirements

Induction topic	Date attended	Countersigned (Training officer)	Notes
Trust induction			
Core Mandatory training			
Information governance			
Safer handling theory			
Safer handling practical			
Conflict resolution			
Equality and diversity			
Information governance			
Prevent			

### Generic Tutorial plan

Week	Date	Topic	Lead	Key learning outcomes
1		Induction		
1		Introduction to placement What is a portfolio of professional practice?		
2		Working within professional boundaries		
3		Operate within confidential practices / policies		
4		Record Keeping		
5		Working in a non-discriminatory manner		
6		Working safely		
7		Communication		
8		Specimen reception		
9		Feedback		

### Possible visits

Where	Date booked	Date attended	Contact person	Notes
EUS				
EBUS				
Endoscopy				
Theatres				
Breast clinic				
MDT				
Breast oncology clinic				
Point of care				
Infection control				
Phlebotomy				
Haematology MDT				
Respiratory MDT				
Head & Neck clinic				

### Cell Path Tutorial plan

Week	Date	Topic	Lead	Reference
1		Specimen reception		
2		Telepath		
3		Fixation		
4		Specimen triage		
5		Principles of dissection		
6		Decalcification		
7		Processing		
8		Embedding		
9		Microtomy		
10		H&E staining / QC		11.1, 11.2, 12.3 - 12.5
11		Quality assurance, QC and audit		14.2 - 14.16m
12		Pipettes		14.2 - 14.16c
13		Balances		
14		pH meters		
15		Environmental monitoring equipment		13.1, 15.1 - 15.6
16		Infective agent demonstration methods		
17		Carbohydrates and Glycoprotein demonstration methods		
18		Fibrin and extracellular protein demonstration methods		
19		Epithelial cell marker demonstration methods		
20		Non gynae preparation		
22		Method validation		
23		Histology of skin		
24		Histology of the upper GI tract		
25		Histology of the lower GI tract		
26		Histology of the gynae		
27		Urological histology		
28		Histology of the respiratory system		

**Work plan**

Activity	Student 1	Student 2	Competency manual sections / competency assessments	Training activities / Equipment training	HCPC sections	Practical / audit activities	Notes / guided reading
Specimen reception	Month 1	Month 2	CP/H58 page 2 – 10  DOPs for specimen reception / telepath  a) Able to receive specimens from service users and check patient details b) Able to book specimens in to telepath accurately c) Able to discuss the location of specimen sites d) Able to handle leaky specimens e) Able to reject discrepant specimens f) Able to keep records of specimen rejection on Q Pulse	<ul style="list-style-type: none"> <li>- Telepath</li> <li>- Q Pulse</li> <li>- Audit</li> </ul>	10.1-10.6  12.2, 12.6-9  3a.2,  13.1 15.1-6	<ul style="list-style-type: none"> <li>- Fixation of eggs – practical</li> <li>- Audit of collection to receipt times</li> <li>- Audit of rejected specimens</li> <li>- Audit of clinical details terms</li> </ul>	<ul style="list-style-type: none"> <li>- Record / reflection of specimen rejection</li> <li>- First records of reflective practice</li> <li>- Read Chapter 1 – Histopathology – Orchard &amp; Nation</li> <li>- Read Chapters 1, 2 &amp; 3 – Cell Structure &amp; Function – Orchard &amp; Nation</li> </ul>
Specimen dissection	Month 2	Month 1	CP/H58 page 11- 28  DOPs for assisting with specimen dissection / cassette printing / decalcification / chuck out  a) Able to prepare the cut up bench ready for cut up b) Able to assist with specimen dissection on the biopsy bench and skins bench c) Able to use the cassette printer	<ul style="list-style-type: none"> <li>- Cassette printer</li> <li>- X-ray machine</li> <li>- Macropath</li> <li>- Dictation system</li> </ul>	14.8-14.9, 14.20-14.22, 14.1 14.24-27, 14.34 14.2-14.16  10.1-10.6  13.11  15 (all)	<ul style="list-style-type: none"> <li>- Need to start a large resection case study</li> <li>- Audit – breast core collection to receipt</li> </ul>	<ul style="list-style-type: none"> <li>- Attend MDT</li> <li>- Attend endoscopy</li> <li>- Attend theatres</li> <li>- Read Chapter 15 – Cell structure &amp; Function</li> </ul>

Activity	Student 1	Student 2	Competency manual sections / competency assessments	Training activities / Equipment training	HCCP sections	Practical / audit activities	Notes / guided reading
			d) Able to maintain records for specimen decalcification e) Able to print bag labels f) Able to overfix specimens				
Microtomy & Microscopy & QC	Month 3	Month 4	CP/H58 pages 29 – 54  DOPS for microtomy  a) Able to float out sections b) Able to cut test blocks with confidence c) Able to embed test blocks d) Able to embed large flat pieces of tissue e) Able to print slide labels f) Able to stain sections using automated strainers g) Able to change automated stainer reagents h) Introduction to EQA	<ul style="list-style-type: none"> <li>- Peloris</li> <li>- ASP300</li> <li>- Embedder</li> <li>- Cryostat</li> <li>- Stainer &amp; Coverslipper</li> <li>- Microscope</li> </ul>	14.23, 14.2-14.16, 13.11  15 (all)	<ul style="list-style-type: none"> <li>- Need to start a vertical audit</li> <li>- Audit of microtome blades</li> </ul>	<ul style="list-style-type: none"> <li>- Need to start a slide box to keep copies of all key tissue types</li> <li>- Need to make time to look at slides each week</li> <li>- Read chapter 3 – Histopathology Orchard and Nation</li> <li>- Read Chapters 7 &amp; 8 – Cell structure &amp; Function</li> </ul>
Main lab (2 weeks) / Immunocytochemistry (2 weeks)	Month 4	Month 3	CP/HF57 – Immunocytochemistry IQC  a) Microtomy of medium sized blocks b) Build up speed and proficiency c) Microtome maintenance d) Introduction to Frozen sections e) Basic concepts in immunocytochemistry f) Introduction to NEQAS for ICC g) Introduction to NEQAS for	<ul style="list-style-type: none"> <li>- Ventana Ultra</li> </ul>	14.23, 14.2-14.16, 13.11  15 (all)  12.2 12.6-12.9, 12.3-12.5 11.1, 11.2, 12.3 - 12.5,	<ul style="list-style-type: none"> <li>- Audit – staining intensity of common antibodies against length of time sections are cut prior to use</li> <li>- Audit of cut section temperature / time</li> </ul>	<ul style="list-style-type: none"> <li>- Case study involving ICC</li> <li>- Read chapters 5 &amp; 6 – Histopathology – Orchard &amp; Nation</li> <li>- Read Chapter 6 – Cell structure &amp; Function – Orchard &amp; Nation</li> </ul>

Activity	Student 1	Student 2	Competency manual sections / competency assessments	Training activities / Equipment training	HCPD sections	Practical / audit activities	Notes / guided reading
			CPT				
Microtomy, Microscopy & QC	Month 6	Month 5	Top up proficiencies experienced in month 3  a) Microtomy of medium sized blocks b) Microtomy of small blocks c) Troubleshooting of specimen microtomy d) Orientation of embedded specimens		14.23, 14.2-14.16, 13.11  15 (all)  12.2 12.6-12.9, 12.3-12.5	Audit – 6 month review of Oestrogen receptor staining positivity rates	Attend Breast MDT Attend breast clinic Read Chapter 11 – Cell Structure & Function – Orchard & Nation
Cut up (2 weeks) / Immunocytochemistry (2 weeks)	Month 5	Month 6	a) Consultant cut up b) Handling different size specimens c) Specimen archiving d) Specimen disposal e) Record keeping	- Ventana Ultra	14.23, 14.2-14.16, 13.11  15 (all)  12.2 12.6-12.9, 12.3-12.5		Case study involving ICC Read chapters 5 & 6 – Histopathology – Orchard & Nation
Main lab (4 weeks)	Month 7	Month 8	a) Microtomy of small blocks b) Able to cut 20 blocks per hour		12.2 12.6-12.9, 12.3-12.5		- Read chapter 12 – Cytopathology - Shambayati
Cut up (2 weeks) / Non-gynae (2 weeks)	Month 8	Month 7	Non gynae student manual  a) Able to do full consultant cut up alone b) Troubleshooting	- T2000 - Centrifuge	12.2 12.6-12.9, 12.3-12.5	Audit of collection to receipt times / location	Short case study linking non-gynae in with histology (maybe respiratory sample)

Activity	Student 1	Student 2	Competency manual sections / competency assessments	Training activities / Equipment training	HCP sections	Practical / audit activities	Notes / guided reading
			specimens c) Able to organise and time manage cut up room				Respiratory MDT Respiratory cancer clinic attendance Read Chapter 7 - Cytopathology
Top up proficiencies  Main lab / immuno / non-gynae as appropriate	Month 9	Month 9	Completion of gaps, top up of competences, more experience of a favourite area subject to competence.				Read Chapter 12 – Cell Structure & Function – Orchard & Nation



## Quality Management

### Knowledge

Can explain what quality management is

	Date completed 1
Completed big 5 Q pulse training (QP/TR2)	
PM/Q/9 BMS Maintenance of competency	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Acknowledge a document	- Identify need to stay in line with department procedures					
Raise a change request	- Able to identify shortfalls in forms and procedures and escalate as appropriate					4.2, 12.2, 12.6 - 12.9
Raise non-conformance	- Identifies work based problems - Able to log details of incidents (HCPC BMS SoP 14.15)					10.1, 10.3 - 10.6
Log equipment failure	- Identify equipment problems - Conduct initial troubleshooting - Log details of equipment failure - Resolve problems as appropriate and log - Escalate issues to manufacturer/ maintenance provider if unable to resolve as appropriate					10.1, 10.3 - 10.6  10.1, 10.3 - 10.6
Error log	- Complete an error log					10.1, 10.3 - 10.6
Quality and process control measures	- Select and apply quality and process control measures					12.8
Quality indicators	- Complete quality indicators - Identify abnormal outcomes from quality indicators - Suggest and assist with remedial actions					12.7 12.9
User questionnaire	- Devise and discuss with training officer a user questionnaire - Execute questionnaire - Collect results and prepare and action plan based on the results					9.4 9.4 9.4 8.9 12.2

### Information management / Telepath

	Date completed 1
Specimen reception questions	
Read and acknowledged CP/H19 telepath SOP	

### Knowledge

- Able to describe the role of the LIMS
- Is aware of PAS and open Exeter
- Can discuss the problems that can occur when specimens booked in incorrectly

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Demonstrate specimen booking in on telepath using RXR number match	- Ensure correct patient details to request					10.1, 10.3 - 10.6
Demonstrate specimen booking in on telepath using NHS number match	- Ensure correct patient details to request					10.1, 10.3 - 10.6
Demonstrate accurate HPROE of a specimen to ensure block and slide details match	- Ensure correct laboratory details to request					
Checking the specimen note pad	- Able to check for previous versions of the final report - Able to record specimen information in the specimen note pad					
Entering post mortem procedures	- Enters procedures in the HPROE screen					10.1, 10.3 - 10.6
Specimen tracking	- Able to complete an audit trail for specimens around the lab					
Information clarification	- Clarify requests for information and advice - Clarify authority for access to information					14.1, 14.34

**Confidentiality**

**Knowledge**

	Date completed 1
Completed information governance training	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Maintains verbal confidentiality regarding patients	- Does not disclose patient information inappropriately					1a.3 8.1 - 8.8
Discards confidential waste paper appropriately	- Uses shred it bags to discard confidential waste - Able to leave the bags in the correct place for removal and disposal					1a.3 8.1 - 8.8
Logs off/ uses protection on computers when finished	- Ensures access to own computer account is controlled					1a.3 10.1, 10.3 - 10.6


**Health & Safety**

	Date completed 1
Read and acknowledged PM/M1 CLM safety manual	
Read and acknowledged CP1 – Cell path safety manual	

**Knowledge**

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
Completed Manual handling practical					
Completed manual handling theory					
Completed respiratory training					
Completed Chemical risk training					
Safety induction questionnaire					
Health & Safety questions					

Identify the following symbols

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Demonstrate ability to clear up a small formalin spill	- Can dispose of waste and leave the area clean					13.1, 15.1 - 15.6
Demonstrate appropriate disposal of anatomical waste	- Appropriate tagging and disposal of anatomical waste					
Demonstrate appropriate disposal of sharps waste	- Appropriate containment and disposal of sharps waste					13.1, 15.1 - 15.6
Reports safety incidents appropriately	- Highlights incidents - Uses Q Pulse as appropriate					
Reports accidents	- Uses accident forms for minor accidents - Uses IR1s to log major incidents					
Demonstrate ability to clear up a large formalin spills	- Uses formalin control granules to clear up spills					13.1, 15.1 - 15.6
Demonstrate appropriate use the respirator	- Able to wear the respirator and obtain an appropriate seal around face					13.1, 15.1 - 15.6

Evidence of troubleshooting (Please enter the non-conformance number below)

**Ethics**

Cross reference to: HCPC standards of conduct performance and ethics, IBMS code of conduct

**Knowledge**

	Date completed 1
Ethics quiz	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Takes responsibility for errors caused i.e. logs Q pulse errors, IR1s	<ul style="list-style-type: none"> <li>- Logs and monitors errors in a timely manner</li> <li>- Closes errors out as appropriate</li> </ul>					4.2, 12.2, 12.6 - 12.9

## Large specimen dissection (aka Bigs)

### Knowledge

	Date completed 1
Specimen reception questions	
Read and acknowledged Decal SOP	
Read and acknowledged specimen storage and disposal SOP	
CP/H2 – Assisting with specimen dissection	
CP/P1 – Specimen dissection (read for info only)	
CP/HF126 Cut Up Quick Guide	
CP/H3 – Specimen Dissection by BMS	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Able to prepare the cut up bench for dissection	<ul style="list-style-type: none"> <li>- Removes instruments from disinfectant</li> <li>- Discards blunt knives</li> <li>- Ensures the cut up bench is free from debris</li> <li>- Fill up formalin tubs for benches</li> </ul>					
Daily / weekly maintenance of cassette printer	<ul style="list-style-type: none"> <li>- Undergone IP-C training</li> <li>- Cleans print head</li> <li>- Prints test cassette</li> <li>- Highlights errors as appropriate</li> </ul>					14.2 - 14.16
Matrix case allocation	<ul style="list-style-type: none"> <li>- Allocates and distributes specimens appropriately across consultants</li> </ul>					
Booking in	<ul style="list-style-type: none"> <li>- Books specimens accurately in to Telepath in a timely manner</li> <li>- Enters specimen types accurately</li> <li>- Enters specimen sites accurately</li> </ul>					14.18 14.2 10.1, 10.3 - 10.6
Collect specimens from Blood Sciences	<ul style="list-style-type: none"> <li>- Picks up specimens from reception at blood sciences in a timely manner</li> </ul>					
Specimen reception	<ul style="list-style-type: none"> <li>- Checks specimens ensuring 3 matching identifiers</li> <li>- Accepts specimens as appropriate</li> <li>- Rejects inaccurate specimens or specimens with errors</li> </ul>					14.8, 14.9 10.1, 10.3 - 10.6 10.1, 10.3 - 10.6
File pots	<ul style="list-style-type: none"> <li>- Files pots in order</li> <li>- Uses keep shelf as appropriate</li> </ul>					14.8, 14.9
Specimen bag up	<ul style="list-style-type: none"> <li>- Bags up large specimens for storage</li> <li>- Uses specimen labels as appropriate</li> <li>- Keeps full photographic records</li> </ul>					14.23, 14.25
Specimen reception housekeeping & 5S sheets	<ul style="list-style-type: none"> <li>- Logs details on the housekeeping sheets as appropriate</li> <li>- Follows up on actions as necessary</li> </ul>					

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Small biopsy dissection (aka Smalls)**

**Knowledge: see Large Specimens (above)**

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Prepare cut up bench for smalls	- Fill up formalin tubs for smalls bench					
Daily / weekly maintenance of cassette printer	- Cleans print head - Runs test cassette - Logs tests - Places plate in alcohol at the end of the week					
Specimen reception	- Checks specimens ensuring 3 matching identifiers - Accepts specimens as appropriate - Rejects inaccurate specimens or specimens with errors - Highlights high risk specimens and deals with specimens as appropriate					14.8, 14.9 14.2 - 14.16 14.2 - 14.16 13.1, 15.1 - 15.6
Specimen allocation	- Allocates specimens to pathologists as appropriate - Logs details on the matrix - Ensures a balance of workload across the team					14.1, 14.34
Biopsy booking in	- Specimens allocated - Bowel Screening biopsies allocated to the appropriate consultants					14.1, 14.34
Assist with small biopsies	- Prints cassettes - Takes dictation - Scans cards					14.23, 14.25 14.23, 14.25
Log gynae cases to go to CMFT	- Numbers of cytology cases to CMFT logged - List forwarded to CLM office for billing					
Discard bags of empty biopsy pots	- Empty pots store managed - Empty pots discarded in line with the SOP					

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes



**Data entry and LIMS**

**Knowledge**

	Date completed 1
Read CP/H19 – Histology and non gynae Telepath	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Book in biopsies (first cases ready to go by 9am)	<ul style="list-style-type: none"> <li>- Books cases in on telepath</li> <li>- First batch available</li> </ul>					
Chase up specimen returns	<ul style="list-style-type: none"> <li>- Logs and tracks returned specimens</li> <li>- Follows up on cases not returned</li> </ul>					10.1, 10.3 - 10.6
Laboratory housekeeping & 5S sheets	<ul style="list-style-type: none"> <li>- Completes housekeeping sheets</li> </ul>					11.1, 11.2, 12.3 - 12.5
Shut down stainer at the end of the day - discuss with late team	<ul style="list-style-type: none"> <li>- Discard waste staining reagents</li> <li>- Tops up with fresh reagents</li> </ul>					
Friday stainer maintenance	<ul style="list-style-type: none"> <li>- Cleans stainer</li> <li>- Wipes out drain area</li> <li>- Uses haztabs to clean the instrument</li> </ul>					14.20 - 14.22
Can prepare 10% formic acid	<ul style="list-style-type: none"> <li>- Prepares reagent</li> <li>- Logs batches accurately</li> <li>- Ensures appropriate safety symbols on containers</li> <li>- Ensure details of made up date, first use date and expiry date are logged on the container</li> </ul>					14.12

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Skin dissection**

**Knowledge: see Large Specimens (above)**

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Prepare cut up bench for skins	<ul style="list-style-type: none"> <li>- Remove instruments from disinfectant</li> <li>- Washes instruments</li> <li>- Ensures all items clean</li> </ul>					
Bag up large resections from the previous day	<ul style="list-style-type: none"> <li>- Bag up specimens using the bag sealer</li> <li>- Label bags as appropriate</li> </ul>					
Assist with skin cut up (ready to start at 11am)	<ul style="list-style-type: none"> <li>- Assist with skin cut up</li> </ul>					
Assist with additional cut up on the skins bench	<ul style="list-style-type: none"> <li>- Make appropriate notes of dictation</li> </ul>					10.1, 10.3 - 10.6
Tidy up bench at the end of the day	<ul style="list-style-type: none"> <li>- Place instruments in disinfectant</li> <li>- Wipe down bench and cut up board</li> <li>- Ensure all blocks are either processing or further fixing and labelled accordingly</li> <li>- Leave notes for tomorrow</li> </ul>					
Chuck out	<ul style="list-style-type: none"> <li>- Select specimens for chuck out from the disposal list as appropriate</li> <li>- Respirator mask worn as appropriate</li> <li>- Specimens discarded into anatomical waste containers</li> <li>- Anatomical waste containers placed in the appropriate location for disposal</li> </ul>					

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

## Filing / MDTs

### Knowledge

	Date completed 1
Read and acknowledged the CP/H14 Filing, Archiving and Disposal SOP	
Read and acknowledged the CP/H15 MDT SOP	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Book in referred cases	<ul style="list-style-type: none"> <li>- Checks telepath to see if the case has been previously received (patient enquiry)</li> <li>- Logs referred cases in telepath</li> <li>- Distributes cases to the appropriate pathologist</li> </ul>					14.1, 14.34
Check office for Lancaster Urology etc	<ul style="list-style-type: none"> <li>- Checks for Lancaster Urology cases for the Network MDT</li> <li>- Cases booked in as appropriate</li> <li>- Details of blocks and slides logged in the macroscopy</li> </ul>					
MDT	<ul style="list-style-type: none"> <li>- Can list the MDT meetings, the day of the meeting and the regular pathologist lead</li> <li>- Can explain when slides should be available for the MDTs</li> <li>- Can print out reports for the MDTs</li> <li>- Can put MDT slides in case order</li> </ul>					
Chase up outstanding unreturned blocks / slides	<ul style="list-style-type: none"> <li>- Follows up about unreturned cases.</li> </ul>					
Archive management –old mortuary	<ul style="list-style-type: none"> <li>- Carries out back filing in archive store</li> </ul>					
Block filing	<ul style="list-style-type: none"> <li>- Can file recent blocks within the lab</li> <li>- Can file blocks in the archive</li> <li>- Leaves a tracer slip when blocks are removed</li> </ul>					
Slide filing	<ul style="list-style-type: none"> <li>- Can file recent slides</li> <li>- Can file blocks in the archive</li> <li>- Leaves a tracer slip when blocks are removed</li> </ul>					
Cell Nass	<ul style="list-style-type: none"> <li>- Can recall blocks from Cell Nass</li> <li>- Can return material back to Cell Nass</li> </ul>					

Evidence of troubleshooting (Please enter the non-conformance number below)

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Retraining episodes

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**Send away clinical material**

**Knowledge**

	Date completed 1
Read and acknowledged the CP/H16 Send away SOP	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Get out extra request blocks	<ul style="list-style-type: none"> <li>- Retrieves material</li> <li>- Places tracer slips in the archive</li> </ul>					
Send away for second opinion / supplementary tests	<ul style="list-style-type: none"> <li>- Packages material up for sending away in a timely manner</li> <li>- Logs details in the post book</li> <li>- Logs details in telepath</li> </ul>					
Send away for trials	<ul style="list-style-type: none"> <li>- Checks trial has ethical approval</li> <li>- Packages material up for sending away in a timely manner</li> <li>- Logs details in the post book</li> <li>- Logs details in telepath</li> </ul>					5.1, 14.17
Check for extra requests	<ul style="list-style-type: none"> <li>- Logs into lab e-mail account</li> <li>- Retrieves new requests at least 3 x a day</li> </ul>					
Understands impact of delays in sending away on treatment and TAT	<ul style="list-style-type: none"> <li>- Sends away within 48hrs</li> </ul>					
Checks list of outstanding specimens / blocks and slides sent away and follows them up	<ul style="list-style-type: none"> <li>- Reviews housekeeping lists</li> <li>- Follows up with labs where referral material has been sent</li> </ul>					

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

## Tissue processing and embedding

### Knowledge

	Date completed 1
Has read and acknowledged CP/H8 Tissue processing SOP	
Has read and acknowledged CP/H9 Embedding SOP	
Has read and acknowledged CP/H10 Microtomy SOP	
Has read and acknowledged CP/H11 Stainer and coverslipper SOP	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Tissue processing	<ul style="list-style-type: none"> <li>- Completed ASP300 Equipment training</li> <li>- Completed Peloris equipment training</li> <li>- Can select the appropriate programme on the tissue processors for the material to process</li> <li>- Can run processor</li> <li>- Can remove racks from the processor at the end of a run</li> <li>- Can flush the machine</li> <li>- Can change reagents on the ASP300</li> <li>- Can change reagents on the Peloris</li> <li>- Can maintain audit records for reagent change</li> </ul>					14.2 - 14.16
Able to embed large slabs of tissue	<ul style="list-style-type: none"> <li>- Selects the correct embedding mould</li> <li>- Embeds large slabs of tissue</li> <li>- Places cassette on the material flatly</li> <li>- Inserts personal ID bead</li> </ul>					14.3 14.4
Embedding centre maintenance	<ul style="list-style-type: none"> <li>- Completed embedder equipment training document</li> <li>- Top up wax in the embedding centre</li> <li>- Clean the wax trains on the embedding centre</li> </ul>					14.4
Floating out	<ul style="list-style-type: none"> <li>- Can float out sections on the waterbath</li> <li>- Logs slides with symbols</li> <li>- Attaches printed barcoded labels</li> </ul>					
Microtomy	<ul style="list-style-type: none"> <li>- Can trim, cut and float 20 large blocks in 1 hour</li> </ul>					14.3 14.4
Staining and coverslipping	<ul style="list-style-type: none"> <li>- Can load a rack on the stainer and coverslipper</li> </ul>					14.2 - 14.16
Hand coverslipping	<ul style="list-style-type: none"> <li>- Can hand coverslip slides</li> </ul>					
Thermoscan software (fridge temperature monitoring)	<ul style="list-style-type: none"> <li>- Can demonstrate the use of Thermoscan software</li> <li>- Can highlight fridge failures</li> </ul>					

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Nice label / label printing**

**Knowledge**

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
Nice label and Zebra printer questions					

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Able to load up nice label on a PC	- Access nice label from the desktop icon					
Able to change a ribbon	- Can correctly load up a ribbon					
Able to change a label roll	- Can correctly load up a label - Can remove stuck labels from the presenting wheel					

**Assisting with consultant cut up**

**Knowledge: see Large Specimens (above)**

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Set up for cut up	<ul style="list-style-type: none"> <li>- Ensure cut up board clean</li> <li>- Ensure instruments are out for cut up</li> </ul>					
Demonstrate patient demographic check	<ul style="list-style-type: none"> <li>- Is there a unique identifying number</li> <li>- Can you check against the date of birth</li> </ul>					14.8, 14.9
Demonstrate appropriate block printing and troubleshooting	-					
Demonstrate appropriate block key notes and macroscopy	-					10.1, 10.3 - 10.6
Keeps appropriate audit trail and block trail details	-					
Fixes and processes specimens as appropriate	- Keeps appropriate audit trail records					
Photographs racks as appropriate	- Keeps appropriate audit trail of the processing regime associated with each block					

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Decalcification**

Cross reference to: CP/H4

**Knowledge**

	Date completed 1
Read and acknowledged Decal SOP	
CP/P1 – Specimen dissection (read for info only)	
CP/HF126 Cut Up Quick Guide	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Under supervision can slice femoral head specimens suitable for further fixation and decalcification	- Able to use the sawbones clamp and saw to slice femoral head specimens					
Can prepare 10% formic acid	- Can prepare a solution of formic acid					4.2, 12.2, 12.6 - 12.9
Can demonstrate end point decalcification testing	- Able to test levels of decalcification using calcium precipitation test					

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes



## X-ray imaging of pathological specimens

### Knowledge

	Date completed 1
Questions about x-ray	
CP/HF144 Faxitron equipment training	
CP/H6 Use of X-ray Machine	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Can switch on and prepare Faxitron MX20, PC and start software	- Can load up the software					
Can enter patient details to start new case	- Enters patient ID data in the X-ray system					
Can prepare specimen for x-ray	-					
Can load specimen into x-ray machine	-					
Can select the appropriate time and KV	-					14.20 - 14.22
Can perform x-ray of small specimen using Faxitron software	- Can x-ray specimens and QC check results on screen before further specimen handling					
Able to log equipment errors	- Create Q Pulse record of equipment error - Ensure issue escalated appropriately - Monitor for action and completion					14.20 - 14.22

### Competence assessment / reassessment comments

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### Evidence of troubleshooting (Please enter the non-conformance number below)

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### Retraining episodes

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**Specimen / slide / block storage and disposal**

**Knowledge**

	Date completed 1
CP/H7Specimen storage and disposal	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Store specimens, slides and blocks as appropriate	- Knows where to file and store specimens, blocks and slides - Stores and retrieves specimens as appropriate					
Select appropriate specimens from the shelf for discard	- Knows the criteria for specimen discard					
Discard of formalin and place specimens in anatomical waste bag	-					
Can tag up specimens for anatomical waste	-					
Can discard small specimen pots	-					
Completes and files appropriate paperwork	- Maintains appropriate audit trails					

<b>Competence assessment / reassessment comments</b>

<b>Evidence of troubleshooting (Please enter the non-conformance number below)</b>

<b>Retraining episodes</b>

**Embedding**

**Knowledge**

	Date completed 1
Processing and embedding questions CP/H9	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Select the appropriate embedding mould	<ul style="list-style-type: none"> <li>- Can select the appropriate embedding mould</li> <li>- Can check mould is free of debris</li> </ul>					14.7
Demonstrate large slabs of tissue embedding	<ul style="list-style-type: none"> <li>- Part fills the mould with wax</li> <li>- Demonstrates embedding of large tissue pieces and pressing the edges down</li> <li>- Ensures embedding position of the wax</li> <li>- Places mould lid on flat</li> <li>- Top up wax</li> <li>- Place audit bead</li> </ul>					14.20 - 14.22 14.20 - 14.22 14.20 - 14.22 14.1, 14.34
Ensure all areas where specimens come in to contact are clear of debris	-					
Ensure forceps and tamping tools are kept clear from debris	-					
Orientate tubes	-					
Orientate biopsies	-					
Orientate skins	-					
Can change fuses on embedding machine	-					
Tops up wax at the end of the embedding process	-					

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

## Microtomy

### Knowledge

	Date completed 1
Questions on microtomy	
CP/H10 Microtomy	

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assessed	Note
Demonstrates use and maintenance of microtome	- Able to load and unload a blade					
Trims large blocks	- Trims blocks to appropriate depth					14.20 - 14.22 14.23, 14.25
Can cut 20 large blocks per hour with no artifact (alone)	- Pays attention to quality  - Completes appropriate audit checks					14.20 - 14.22 14.1, 14.34 14.23, 14.25
Can cut 30 large blocks per hour with no artifact (alone)						
Can cut 40 large blocks per hour with no artifact (with floater)						14.1, 14.34
Can cut 60 large blocks per hour with no artifact (with floater)						14.1, 14.34
Uses barcode scanners and label printers						14.1, 14.34
Can float out sections on the waterbath	-					
Audit trails slides with symbols	-					
Can cut and appropriately orientate 20 ribbon blocks with no artifact (alone)	-					
Can cut and appropriately orientate 40 ribbon blocks with no artifact (with a floater)	-					
Can cut and appropriately orientate 15 levels blocks with no artifact (alone)	-					
Can cut and appropriately orientate 30 levels blocks with no artifact (with a floater)	-					
Completes housekeeping logs for area of work	-					

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Quality control (internal and external)**

**Knowledge**

	Date completed 1
Questions on QC & EQA	
CP/H12 Internal Quality Control of H & E	
CP/H13 External Quality Assurance	

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re-assess	Note
Can block check	-					
Can check details on form against slides and blocks	- Maintain audit trails					
Can check the quality of the routine H&E staining	- Reviews staining - Logs actions and remedial steps as appropriate					
Can identify common artefacts	-					
Can approve and close off worklists	- Uses telepath to tack specimens through the Lab QC process					
Can check orientation of tissue	- Identify badly orientated skin specimens - Re-embeds specimens as appropriate					
Use of control material	- Selects appropriate control material for control blocks - Checks suitability of control material - Records appropriate use of control material					
Checks EQA material for quality with a BMS member of staff	-					14.2 - 14.16
Able to complete paperwork and send EQA materials	- Can stain and send materials as appropriate					
Able to log EQA episodes as an audit on Q Pulse	- Able to make appropriate records of EQA activities - Able to log personnel involved so external review of work activities can be traced back					10.1, 10.3 - 10.6
Can record results of EQA episodes	- Can log-non conformances as appropriate					4.2, 12.2, 12.6 - 12.9

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

### Microscopy & tissue recognition

Cross reference to: CP/H62

#### Knowledge

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
Microscopy questions					

#### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Demonstrate setting up a microscope for Kohler illumination	<ul style="list-style-type: none"> <li>- Able to focus sub stage condenser</li> <li>- Able to correctly set iris diaphragm</li> </ul>					14.20 - 14.22 14.2 - 14.16
Demonstrate changing a microscope bulb	<ul style="list-style-type: none"> <li>- Able to change a bulb</li> </ul>					14.20 - 14.22
Demonstrate cleaning microscope lenses	<ul style="list-style-type: none"> <li>- Uses lens cloths and alcohol appropriately</li> </ul>					14.20 - 14.22
Recognise and name the key features of normal histology	<ul style="list-style-type: none"> <li>- Skin</li> <li>- Breast</li> <li>- Oesophagus</li> <li>- Stomach</li> <li>- Duodenum</li> <li>- Gall Bladder</li> <li>- Liver</li> <li>- Kidney</li> <li>- Prostate</li> <li>- Bladder</li> <li>- Uterus and Cervix</li> <li>- Lymph node</li> </ul>					14.2 - 14.16

#### Competence assessment / reassessment comments

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#### Evidence of troubleshooting (Please enter the non-conformance number below)

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#### Retraining episodes

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## Special stains

### Knowledge

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
Special stains questions					

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Can enter patient details into the system and print labels	<ul style="list-style-type: none"> <li>- Enters details into the Ventana system</li> <li>- Prints labels</li> <li>- Applies labels to the slides</li> </ul>					
Can load Benchmark BSS	<ul style="list-style-type: none"> <li>- Can load slides correctly</li> </ul>					
Use of control material	<ul style="list-style-type: none"> <li>- Cut and log control material on appropriate record sheets</li> <li>- Test control material for suitability</li> </ul>					14.2 - 14.16 4.2, 12.2, 12.6 - 12.9
Make up bulk reagents	<ul style="list-style-type: none"> <li>- Prepare bulk buffers for routine use</li> </ul>					14.2 - 14.16
Prepare hand staining special stains solutions	<ul style="list-style-type: none"> <li>- Using buffers and pipettes, prepare antibody dispensers</li> </ul>					14.2 - 14.16 14.2 - 14.16
Special stain evaluation and validation	<ul style="list-style-type: none"> <li>- Prepare various methods of special stains</li> <li>- Evaluate the various preparations</li> <li>- Write a report / validation document</li> </ul>					14.23, 14.25 14.1, 14.34 4.2, 12.2, 12.6 - 12.9 14.5
Discard waste reagents	<ul style="list-style-type: none"> <li>- Use appropriate waste streams for disposal</li> <li>- Use heavy metal extraction filter system</li> </ul>					13.1, 15.1 - 15.6
Coverslip and collate slides	<ul style="list-style-type: none"> <li>- Collate stained slides into cases</li> </ul>					
Evaluate stained slides for:- <ul style="list-style-type: none"> <li>- Connective tissue</li> <li>- Fibrin</li> <li>- Amyloid</li> <li>- Carbohydrates</li> <li>- Lipids</li> <li>- Nucleic acids</li> <li>- Infective agents</li> </ul> Pigments	-					14.23, 14.25
Participate in send away and review of EQA materials	-					
Log procedures on telepath	-					

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes



## Immunocytochemistry

Cross reference to: CP/H13

### Knowledge

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
EQA questions					

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Can load Benchmark ultra ICC machine	- Load slides for ICC staining					
Can enter patient details into the system and print labels	- Enters details into the Ventana system - Prints labels - Applies labels to the slides					
Use of control material	- Cut and log control material on appropriate record sheets - Test control material for suitability					14.2 - 14.16 4.2, 12.2, 12.6 - 12.9
Make up bulk reagents	- Prepare bulk buffers for routine use					14.2 - 14.16
Prepare primary antibody vials	- Using appropriate buffers and pipettes prepare antibody dispensers					14.2 - 14.16
Titre evaluation and validation	- Prepare various titres of antibodies - Evaluate the various preparations / pre-treatments / clones					14.1, 14.34 4.2, 12.2, 12.6 - 12.9 14.5
Discard waste reagents	- Use appropriate waste streams					13.1, 15.1 - 15.6
Coverslip slides and collate into cases	-					
Can identify positive staining reactions using DAB or red chromogens.	-					
Participate in send away and review of EQA materials	-					
Log procedures on Telepath	-					
Complete immunocytochemistry quality indicators	-					11.1, 11.2, 12.3 - 12.5

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

**Health & Safety**

Cross reference to: SoP section 15

**Knowledge**

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5

**Competence**

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Work in a safe manner and act in accordance with H&S legislation and safety policies	- Follows trust and laboratory safety policies and procedures					13.1, 15.1 - 15.6
Prepare risk assessment	-					13.1, 15.1 - 15.6
Correctly use personal protective equipment: laboratory coats, protective gloves, eye protection	-					13.1, 15.1 - 15.6
Comply with staff health screening, prophylaxis and vaccination policies	- Complete appropriate pre-work screening checks					13.1, 15.1 - 15.6
Decontaminate areas of work as appropriate	- Use disinfectants to clean instruments and keep appropriate logs					13.1, 15.1 - 15.6
Dispose of laboratory waste as appropriate	- Dispose of chemical waste - Dispose of Clinical waste					13.1, 15.1 - 15.6
Use fume cupboards, safety cabinets and down draft benches as appropriate	-					13.1, 15.1 - 15.6

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

### Non gynae cytology

Cross reference to: CP/H13

### Knowledge

	Date completed 1	Date completed 2	Date completed 3	Date completed 4	Date completed 5
Non gynae questions					

### Competence

Task	Details	Level / Date achieved / signed by				
		E / Train	P	la	Re- assessed	Note
Can receive or reject specimens as appropriately	<ul style="list-style-type: none"> <li>- Checks patient demographics</li> <li>- Rejects and returns inappropriately labelled specimens</li> <li>- Highlights high risk specimens</li> <li>- Can label specimens up appropriately.</li> </ul>					14.8, 14.9 14.8, 14.9 14.8, 14.9 14.8, 14.9 13.1, 15.1 - 15.6i
Can determine when to use Glacial Acetic Acid wash step.	-					4.2, 12.2, 12.6 - 12.9
Can evaluate pellet and determine concentration of sample to use in vial.	-					
Carry out instrument daily checks	-					
Can operate the centrifuge and T2000 thin prep machine	-					
Can stain slides correctly.	-					
Can prepare cell blocks	-					
Can store all sample pots appropriately	-					
Can dispose of all non gynae samples appropriately	-					
Understands Major/Minor incident plans	-					
Can switch on Hood and use appropriately	-					
Uses protective equipment	-					
Disposes of waste materials correctly	-					
Participate in the sending / evaluation of EQA materials	-					4.2, 12.2, 12.6 - 12.9 4.2, 12.2, 12.6 - 12.9

Competence assessment / reassessment comments

Evidence of troubleshooting (Please enter the non-conformance number below)

Retraining episodes

### Professional practice

Activity	Review date 1	Review date 2	Note
Keep records of CPD			
Discuss current trends and techniques			
Case study			11.1, 11.2, 12.3 - 12.5
Journal Club - Evaluate research paper			12.1, 14.28 - 14.33
Literature review			12.1, 14.28 - 14.33

**Attendance / sickness diary**

Week	Date W/C	Monday	Tuesday	Wed'day	Thursday	Friday	Signed Training officer . mentor supervisor	Notes	Total Annual leave so far	Total sickness so far
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										

Week	Date W/C	Monday	Tuesday	Wed'day	Thursday	Friday	Signed Training officer . mentor supervisor	Notes	Total Annual leave so far	Total sickness so far
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30										
31										
32										
33										

Week	Date W/C	Monday	Tuesday	Wed'day	Thursday	Friday	Signed Training officer . mentor supervisor	Notes	Total Annual leave so far	Total sickness so far
34										
35										
36										
37										
38										
39										
40										