Appendix 2: Record of competency assessment

Trainee details

Name of trainee: ……

Date competency assessment commenced*…….

Organisation responsible for in service training……..

Name of Line Manager……..

Name of microscopy trainer……..

* competency assessment should be completed within 3 months of commencement

Record of competency assessment

(Columns A-D to be completed by a named microscopy trainer)

	A		B	C	D
	Areas covered (Tick)	**Competent**	**Comments**	**Signature**	**Date completed**
	Microscope set-up				
1. Able to state the meaning, function, purpose and/or operation of each of the following:					
1.1 Condenser					
1.2 Centering the condenser					
1.3 Aperture diaphragm					
1.4 Illumination and light filters					
1.5 Objectives and data on them					
1.6 Resolution					
1.7 Definition					
1.8 Eyepieces					
1.9 Use of the field diaphragm					
1.10 Magnification					
1.11 Numerical aperture					
2.0 Satisfactorily perform a microscope set-up for brightfied microscopy					

	Areas Covered	**Competent (Initial)**	**Comments**	**Signature**	**Date completed**
2.1 States potential problems that can affect function of the light microscope and identify possible solutions as detailed within the procedure					
	Awareness of Laboratory health and safety issues				
3. Laboratory health & safety					
Has access to & understands:					
3.1 local policies for laboratory health and safety and COSHH guidelines					
3.2 safety responsibilities of employer & employee under the Health & safety at work act 1974, COSHH & current safety legislation					

	Areas Covered	Competent (Initial)	Comments	Signature	Date completed
3.3 Laboratory hazards:					
Microbiological					
Fire & electric					
Chemical					
Mechanical					
3.4 Methods of reporting spillage					
3.5 Reporting procedures for hazardous faults					
3.6 Safe storage for hazardous substances					
3.7 Disposal methods for hazardous waste					
3.8 the universal precautions for handling specimens					
3.9 Exhaust protective cabinets					
3.10 Ventilated work areas					
3.11 the safe disposal of Microscopy slides					
3.12 Reporting laboratory accidents and staff health screening					

	Areas covered (Tick)	Competent	Comments	Signature	Date completed
3.13 Evacuation and assembly point in the event of fire					
4. Quality assurance Knows:					
4.1 The principles of quality assurance as part of good laboratory practice					
4.2 The system of specimen and procedure checks operating in the department					
4.3 How to use standard operating procedures (SOPs)					
4.4 Principles of internal quality control					
5. Preparatory Techniques					
5.1 Understands the collection and preparation of specimens from the male & female anogenital tract					

	Areas covered (Tick)	Competent	Comments	Signature	Date completed
5.2 Prepares and organises clinical area and equipment					
5.3 Uses protective clothing throughout the procedure					

	Areas Covered (Tick)	Competent (Initial)	Comments	Signature	Date completed
6. Gram staining					
6.1 Can state the purpose of the Gram Staining procedure and is aware of the background theory					
6.2 Can state the stages of the Gram Staining procedure sequentially, including the duration of application of each stain and its purpose.					
6.3 Knows why protective clothing should be worn during the					

procedure					
	Areas covered (Tick)	**Competent (Initial)**	**Comments**	**Signature**	**Date completed**
6.4 Aware of the importance of correct application of the smear to the slide					
6.5 Aware of the need to dry/fix the smear as per local practice and problems associated with overheating a smear.					
6.6 Applies Crystal Violet and leaves on slide for 15 seconds					
6.7 Rinses slide under cold tap water					
6.8 Applies Gram's Iodine and leaves for 15 seconds					

6.9 Applies Acetone immediately					
6.10 Rinses specimen under cold tap water immediately					
6.11 Applies red counterstain and leaves on slide for 15 seconds					

	Areas covered (Tick)	**Competent (Initial)**	**Comments**	**Signature**	**Date completed**
6.12 Rinses slide under cold tap water					
6.13 Blots the slide and dries on hot plate					
7. Use of the Microscope					
7.1 Positions the microscope eyepieces to appropriate position					
7.2 Assumes position in relation to microscope, least likely to result in injury with prolonged use					
7.3 Checks microscope and cleans in accordance with manufacturers guidelines					
7.4 Places and secures the slide, awareness of problems of looking at the unstained side of a microscope slide					
7.5 Focuses on specimen using x10 magnification					

	Areas covered (Tick)	Competent (Initial)	Comments	Signature	Date completed
7.6 Uses fixed eyepiece to focus on the object and bring it sharply into focus					
7.8 Places oil on specimen on slide (for x100 magnification)					
7.9 Focuses on the specimen using x100 magnification					
7.10 Increases illumination to view slide					
7.11 Searches the specimen in a regular pattern and records relevant findings					
7.12 Cleans objective and lens in accordance with manufacturers guidelines					
7.13 Turns down light and switches off microscope. Places dust cover over microscope					
7.14 Leaves microscope and clinical area clean and ready for use					

	Areas covered (Tick)	**Competent (Initial)**	**Comments**	**Signature**	**Date completed**
8. Wet film:					
8.1 Places wet film on stage					
8.2 Uses x10 magnification to focus on specimen					
8.3 If too bright, closes the diaphragm to cut down the light					
8.4 Uses x40 magnification to search for trichomonads					

	Tick and initial each successful identification (x 3 in total)	**Comment**	**Signature**	**Date completed**
9. Identifies the appearance and states the significance of the following cells/organisms/spores, making reference to where the Gram-stained specimen was obtained from (i.e. vagina, cervix, urethra, rectum): Three successful identifications are required for each entity				
8.1 Polymorphs				
8.2 Gram negative intracellular diplococci				
8.3 Gram negative extracellular diplococci				
8.4 Spores				
8.5 Pseudo mycelium				
8.6 Epithelial cells				

	Tick and initial each successful identification (x 3 in total)	Comment	Signature	Date completed
8.7 Lactobacilli				
8.8 Spermatozoa				
9. Successfully identifies the microscopic presentation of the following STIs and other genital conditions on Gram-stained preparations . Three successful identifications are required in each section)				
9.1 The grading of vaginal flora according to the Ison Hay criteria				
Grade 0				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Ungradeable				
9.2 Candidacies				
9.3 Non Gonococcal Urethritis				
9.5 Gonorrhoea				
10. States purpose and procedure for preparation and viewing of a wet slide				
10.1 describes appearance and significance of trichomonads				
11. States action to be taken following the identification of each of the above cells/organisms				

	Areas covered (Tick)	**Competent (Initial)**	**Comments**	**Signature**	**Date completed**
12. Satisfactorily perform a set-up for darkfield microscopy					
Satisfactorily performs dark-field microscopy and correctly identifies any treponemes present					

All Criteria Met **Yes** **No**

Signature of Assessor……Print Name……..

Date……