

## TRAINING UPDATE

**Lab Location:** SGMC & WOMC  
**Department:** Mgmt & QA

**Date Distributed:** 2/11/2020  
**Due Date:** 3/1/2020  
**Implementation:** 2/18/2020

### DESCRIPTION OF REVISION

<b>Name of procedure:</b>
<b>Medical Training Solutions (MTS) SGAH.L46 v6</b>
<b>Description of change(s):</b>
<p>Section 5: added sort and evaluate by employee Section 6: added form</p> <p><a href="#">This revised SOP will be implemented February 18, 2020</a></p>

Document your compliance with this training update by taking the quiz in the MTS system.

Non-Technical SOP

<b>Title</b>	<b>Medical Training Solutions (MTS)</b>	
<b>Prepared by</b>	Leslie Barrett	Date: 8/24/2010
<b>Owner</b>	Robert SanLuis	Date: 11/29/2016

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:	Local Effective Date:	

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**1. PURPOSE**

This procedure describes the use of Medical Training Solutions (MTS) for administering and tracking competency and training.

**2. SCOPE**

This procedure applies to all Laboratory staff.

**3. RESPONSIBILITY**

All employees must understand and utilize MTS in accordance with this procedure.

Supervisors and managers write and revise custom competency tests, and must ensure staff complies with this procedure.

Quality Assurance personnel may facilitate process by editing and loading custom competency tests and training updates, assigning tests, and providing compliance reports.

#### 4. DEFINITIONS

MTS – Medical Training Solutions, web based training and competency system accessed via [www.medtraining.org](http://www.medtraining.org).

#### 5. PROCEDURE

##### A. General Description and Information

1. The system is used for both competency and training.
2. Custom competency tests may be added to the system. Other portions of competency assessment (direct observation, record review, test performance) will be administered on paper documents.

**Notes:**

- Assignments for job specific competencies are based on Job Authorization Grids
  - Consistency of morphology is assessed by identification of uploaded photographs for hematology, microbiology, urinalysis and body fluids.
3. Training updates are placed on the system in quiz format.
    - a. A copy of the revised SOP will be uploaded onto MTS. Click on '**Download Document**' to view the SOP.
    - b. MTS will prompt for acknowledgement that the document has been read. Click to 'check' the box to certify the revised SOP has been read or reviewed.
    - c. Click '**Take Test**' to proceed to the quiz. Questions will encompass major revisions to the SOP.
    - d. In some rare situations, a hard copy of an SOP may be placed in a training update binder.
  4. MTS contains a training library with modules that cover technical, nontechnical and safety areas of the Laboratory. Applicable training may be assigned at the supervisor's discretion, and will appear in red. Unassigned training modules may also be taken by clicking on the 'Training Library' button and then click the module title.
  5. Notification of new assignments may be communicated via LIS mailbox, posted listing or staff meetings. The due date for completing each assignment will be included in the notification. **All employees are expected to log onto the system frequently (a minimum to every 2 weeks) to check for new assignments.**
  6. Disciplinary Action Plan for Failure to Complete Assigned Competency and/or Training by due date
    - a. Progressive discipline will be issued each week until the assignment is complete (i.e., move up one step of disciplinary action for every 7 days the person is late)
    - b. Initial failure to meet assigned training or competency deadline – Summary of Discussion
      - Associate cannot perform procedure until assignment is complete

- Associate will be allowed 7 additional calendar days to complete assignment with passing score from date of summary of discussion
  - c. Failure to meet deadline – Written Warning
    - Associate cannot perform procedure until competent
    - Associate will be allowed 7 additional calendar days to complete assignment with passing score.
  - d. Final Written Warning
    - Associate cannot perform procedure until competent
    - Associate will be allowed 7 additional calendar days to complete assignment with passing score.
  - e. Recommendation for Termination

**Note:** The associate will be placed on an action plan at the time of the initial Summary of Discussion. The expectation to be compliant with the above completion timeline will be reviewed with the associate and attached to the Summary of Discussion. Repeat occurrence within 6 months of any phase of discipline will continue the previous disciplinary process.
  - f. Refer to Employee Conduct policy for details for documenting discipline.
7. After logging into MTS, the Home screen will display ‘My Assignments’.
- a. Custom assignments will display under ‘QDx at AHC Content’
  - b. MTS system assignments will display under ‘Lab Training Library’ or ‘Lab Competency Assessment’ as appropriate
  - c. Click on the title of an assignment to complete it

## B. Login instructions

1. The website is accessed via Adventist Healthcare PCs within the Laboratory. It may be available as an icon, saved as a ‘favorite’ on a browser or accessed by entering [www.medtraining.org](http://www.medtraining.org) in the browser.

**Note:** The website may also be accessed from an employee’s home computer.
2. Employees are initially setup on the system with
  - a. User ID is their employee number
  - b. Password must be 6 characters long. Utilize their location plus digits (WOMC, SGMC, GEC).
3. To change password
  - a. click your UserID shown in the upper right of the screen
  - b. type new password in ‘**Password**’ field
  - c. click ‘**Save**’ at the bottom of the screen
4. If you have forgotten your password, notify your supervisor who can reset it. Once reset, you can log on and change it as described above.
5. User ID can be changed to an email address (personal or work) by typing it in the ‘Email/Username’ field and clicking ‘Save’.

### C. Test Grading for Competencies

1. Passing score is **100%**.
2. If the score is <100%, the employee must notify their supervisor.
  - a. The supervisor must review all incorrect answers with the employee, re-set the test and instruct the employee to re-take.
  - b. The supervisor will document the review on the MTS reset spreadsheet saved to the shared drive.  
**Note:** No person with administrative access may re-set their own test. Another competent employee must re-set and document accordingly.
3. If the score on the second attempt is <100%:
  - a. Conduct remedial training and review the employee's previous work to determine whether patient results were affected. Additional corrective action is indicated if patient results were affected. **Note:** all remedial training must be documented on a training verification form.
  - b. Re-set the test again and document as described above.

### D. Test Grading and Failures for Training Updates

1. Passing score is **80% or greater** unless otherwise specified.
2. If an employee fails an update quiz (score <80%), the employee is expected to review the correct answers on line and notify their supervisor. The supervisor will re-set the test and instruct employee to re-take (no documentation required).
3. If an employee fails an update quiz a second time, the supervisor must discuss incorrect answers with him/her before re-setting the test.

### E. Consistency of Morphology Assessment

1. The technical supervisors determine the challenge microphotographs from existing CAP challenge images.
2. The quiz is created with all challenge images designated as 'ungraded.' This eliminates the possibility of staff requesting a re-set.  
**Note:** a copy of the quiz with correct answers must be retained.
3. When the testing period is over, extract a report from MTS for all staff (see addenda B).
  - a. Sort the data by question:
    - Utilize pivot tables to display each question that doesn't demonstrate 100% consistency.
    - Create a summary showing all questions, the intended answer, total number of staff and number of those who chose the intended answer.
    - Assess the results; include number of questions with 100% consistency and overall accuracy. Describe the findings for those questions that did not show consistent reporting.

- b. Sort the data by employee and use pivot tables to show staff who demonstrated inconsistent answers (refer to addenda B).
  - Complete a Morphological Consistency Non-Conformance for staff with inconsistencies. The supervisor reviews the performance with the technologist, who signs.
  - Signed non-conformance form is retained in the employee's training file
  - Employees with scores below 80% are removed from that bench until re-training is performed and competency demonstrated.

4. Inconsistencies are addressed through re-training. This may be on an individual or system level depending on the circumstances.

#### F. System Administrators

1. To manage users, assignments, content and create reports refer to 'MTS Administrator Instructions' (see link on MTS via Support).
2. Use the browser arrows at the top of your screen to move back to previous screens.
3. Track Progress
  - a. View Status by Program
    - 1) Click 'Content' button
    - 2) Select Group, Program and Date (MTS utilizes a 6 month time frame) from the drop down.
    - 3) Titles listed to the right have been assigned for the time period. System displays the number of employees assigned, number that have completed and average score.
    - 4) Click on a Title to see list of employees who have completed and their scores.
  - b. View Status by User
    - 1) Click 'User' button
    - 2) Select Group, Program and Date (MTS utilizes a 6 month time frame) from the drop down
    - 3) Employees listed have assignments for the time period. System displays the number of assigned, number that have completed and average score.
    - 4) Click on an employee to see list of assignment titles. Those that have been completed will display their score and date. Click the test title to display a list of questions; any that were incorrectly answered will be designated as such. Click on the question to display it.

#### G. Record Retention

1. User test history is maintained online for the life of the system.
2. Upon resignation, a transcript is printed for the employee and retained in their competency file.

**6. RELATED DOCUMENTS**

Competency Assessment, QA procedure  
 Training Verification, QA procedure  
 Employee Conduct, Laboratory policy  
 Morphological Consistency Non-Conformance form (AG.F481)

**7. REFERENCES**

None



**8. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
000	5/21/2012	Update owners Section 5: Item C added, subsequent items re-numbered, Item E detail removed and reference to addendum C added Section 9: add addenda B & C	L. Barrett	L. Loffredo
001	11/29/16	Update owner Header: add other sites Section 5: add disciplinary action to Item A Section 6: add lab policy Section 9: update location of addendum C Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L. Barrett	R. SanLuis
2	2/15/17	Section 5: revise quiz re-set process Section 9: delete electronic documentation example	L. Barrett	R. SanLuis
3	7/10/17	Section 5: add process for consistency of morphology	L. Barrett	R. SanLuis
4	10/16/19	Header: changed WAH to WOMC Section 5: added process to assess consistency of morphology, added MTS Admin instructions available on website Section 6: updated SOP titles Section 9: replaced MTS attachment with data extraction process	L Barrett	R SanLuis
5	1/28/20	Section 5: added sort and evaluate by employee Section 6: added form	L Barrett	R SanLuis

**9. ADDENDA AND APPENDICES**

- A. Example of Failed Quiz screen
- B. Data Extraction for Consistency of Morphology

## Addenda A



[Leslie.X.Barrett@questdiagnostics.com](mailto:Leslie.X.Barrett@questdiagnostics.com) | [Support](#) | [Logout](#)

My Assignments Training Library My CE Manage: Users Content Preferences

TEST  
**Management of Vendor Notifications SOP v0**

LESLIE BARRETT  
Score: **66%** [Request Retake](#)  
Test Date: 5/11/2012 7:19:01 AM

**1** A director, manager or supervisor receives a recall notice for a product in use within the lab. What action should be taken?

- Notify someone in the lab QA team
- Assist the QA team in preparing a response, if applicable
- Immediately call the Medical Director
- Both options 1 and 2
- All of the above

**EXPLANATION**  
Per the Responsibility section of SOP: It is the responsibility of the department directors, managers and supervisors to forward vendor notifications to the QA department AND to act on any vendor required response through the QA department.

**2** What is the process for maintaining documentation of vendor notifications?

- Keep paper records in the Operations Director's office
- Supervisor must scan and email

**EXPLANATION**  
The QA department maintains notification documentation and any resolutions and/or responses. Documents will be scanned and saved electronically on the shared drive.



## Addenda B

### Data Extraction for Consistency of Morphology

1. Log into MTS
2. Choose **Manage Content**
3. Click the link to select the document (quiz) title
4. On the document (quiz) page, use the drop down to select **All Groups** (under Group)
5. Select the employees by clicking box beside names
6. In Generate Report section
  - a. Choose **Question Details** and **csv** format
  - b. Click **Download**
7. Open the csv file
8. Use 'save as' function to save as an excel workbook (.xlsx).

**GENERATE REPORT:**

- One user per page
- Assigned and complete
- Completed only
- Incompleted only
- Full test history
- Question Details
- User Status
- pdf
- csv

[Download](#)

#### Creating a pivot table for individual employees

1. Remove blank lines within an employee
2. Copy correct answers to each employee
3. Create column for Agreement
4. Add formula to each line =If(H2=I2,"Y","N")
5. Create pivot table
6. Rows = last name, columns – question number, filter = Agreement = N, Values = Count of Agreement
7. Copy Question number and correct Answer to Pivot table sheet