



### TRAINING UPDATE

**Lab Location:** All locations  
**Department:** All departments

**Date Distributed:** 2/19/24  
**Due Date:** 3/19/24  
**Implementation:** When approved

#### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>
<b>AHC.L46 Medical Training Solutions (MTS)</b>
<b>Description of change(s):</b>
<p>Section 5a &amp; f: changed verbiage and added examples for clarity.  Section 5e: added “QA will” extract...  Section 9: added Addenda C</p> <p style="color: blue;">This update is an opportunity to review the entire procedure.</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.

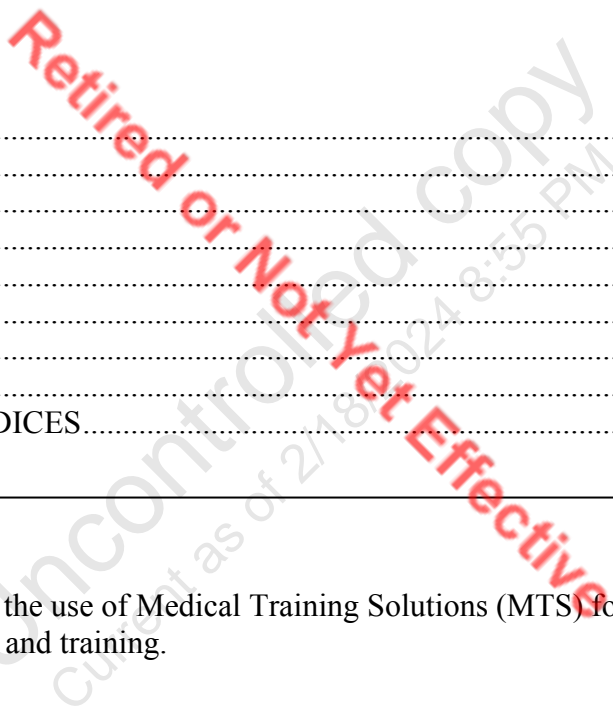
**3. RESPONSIBILITY**

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

Supervisors and managers

- write and revise custom competency tests
- perform a quarterly check (minimum) to verify staff have completed assignments
- ensure staff members comply with this procedure
- perform the required discipline as outlined in 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

Step	Action
1	<p>The system is used for competency, training, and continuing education (CE).</p> <p>Because MTS tracks training using a 6-month period, due dates will always be displayed as June 30 or December 31 in the system. The actual due dates for assignments are listed below:</p> <ul style="list-style-type: none"> <li>• The due date for a training update is included on the cover page; generally 30 days from the date assigned.</li> <li>• Due dates for competency quizzes are communicated by the supervisor. Annual Competency is broken into 2 six-month periods January-June and July-December.</li> </ul>
2	<p>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. <b>Notes:</b></p> <ul style="list-style-type: none"> <li>• Assignments for job specific competencies are based on the training spreadsheet</li> <li>• Consistency of morphology is assessed by identification of uploaded photographs for hematology, microbiology, urinalysis and body fluid.</li> </ul>
3	<p>Training updates are placed on the system in quiz format.</p> <ol style="list-style-type: none"> <li>a. A copy of the revised SOP will be uploaded onto MTS along with a cover page that summarizes the review. Click on ‘<b>Download Document</b>’ to view the SOP. Employees are encouraged to leave the downloaded document open to reference the document while answering quiz questions.</li> <li>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.</li> <li>c. Click ‘<b>Take Test</b>’ to proceed to the quiz. Questions will encompass major revisions to the SOP.</li> </ol>
4	<p>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. Unassigned training modules may also be taken by clicking on the ‘Training Library’ button and then click the module title. Due dates for discretionary assignments will be communicated and tracked by the supervisor.</p>
5	<p>Sharing quiz answers (verbal or printed) with co-workers is prohibited. MTS questions and answers should never be printed. Such action is a violation of the code of conduct and RISES values. Offenders will be subject to disciplinary action.</p>

Step	Action
6	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. <b>All employees are expected to log onto the system frequently (a minimum to every 2 weeks) to check for new assignments.</b> EOW weekend staff must log-in and complete assignments on their assigned weekends.
7	Disciplinary Action Plan for Failure to Complete Assigned Competency and/or Training by due date <ol style="list-style-type: none"> <li>a. Progressive discipline will be issued each week until the assignment is satisfactorily completed (i.e., move up one step of disciplinary action for every 7 days the person is late)</li> <li>b. Initial failure to meet assigned training or competency deadline – Summary of Discussion                             <ul style="list-style-type: none"> <li>• Associate cannot perform procedure until assignment is complete</li> <li>• Associate will be allowed 7 additional calendar days to complete assignment with passing score from date of summary of discussion</li> </ul> </li> <li>c. Failure to meet deadline – Written Warning                             <ul style="list-style-type: none"> <li>• Associate cannot perform procedure until competent</li> <li>• Associate will be allowed 7 additional calendar days to complete assignment with passing score.</li> </ul> </li> <li>d. Final Written Warning                             <ul style="list-style-type: none"> <li>• Associate cannot perform procedure until competent</li> <li>• Associate will be allowed 7 additional calendar days to complete assignment with passing score.</li> </ul> </li> <li>e. Recommendation for Termination</li> <li>f. Refer to Employee Conduct policy for details for documenting discipline.</li> </ol>
8	After logging into MTS, the Home screen will display ‘My Assignments’. <ol style="list-style-type: none"> <li>a. Custom assignments will display under ‘QDx at AHC Content’</li> <li>b. MTS system assignments will display under ‘Lab Training Library’ or ‘Lab Competency Assessment’ as appropriate</li> <li>c. Click on the title of an assignment to complete it</li> </ol>

## B. Login instructions

Step	Action
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 <a href="http://www.medtraining.org">www.medtraining.org</a> in the browser. <b>Note:</b> The website may also be accessed from an employee’s home computer.
2	Employees are initially setup on the system with <ol style="list-style-type: none"> <li>a. User ID is their employee number</li> <li>b. Password must be 6 characters long.</li> </ol>
3	To change password <ol style="list-style-type: none"> <li>a. click your UserID shown in the upper right of the screen</li> </ol>

Step	Action
	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**

Step	Action
1	Passing score is <b>100%</b> .
2	<p><b>If the score is &lt;100%, the employee must contact their supervisor in person or via telephone for reset.</b></p> 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. <b>Note:</b> No person with administrative access may re-set their own test. Another competent employee must re-set and document accordingly.
3	<p><b>If the score on the second attempt is &lt;100%:</b></p> a. The supervisor will conduct remedial training and review the employee's previous work to determine if patient results were affected. Additional corrective action is indicated if patient results were affected. <b>Note:</b> 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**

Step	Action
1	<b>Passing score is 80% or greater unless otherwise specified.</b>
2	If an employee fails an update quiz (score <80%), the employee is expected to review the correct answers online and request reset via MTS (refer to appendix A)The supervisor will re-set the test within 3-5 days. The assignment will reopen for the employee to retake. (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

Step	Action
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. <b>Note:</b> a copy of the quiz with correct answers must be retained.
3	When the testing period is over, QA will extract a report from MTS for all staff (see addenda B). <ol style="list-style-type: none"> <li>a. Sort the data by question:                             <ul style="list-style-type: none"> <li>• Utilize pivot tables to display each question that doesn’t demonstrate 100% consistency.</li> <li>• Create a summary showing all questions, the intended answer, total number of staff and number of those who chose the intended answer.</li> <li>• 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.</li> </ul> </li> <li>b. Sort the data by employee and use pivot tables to show staff who demonstrated inconsistent answers (refer to addenda B).                             <ul style="list-style-type: none"> <li>• Complete a Morphological Consistency Non-Conformance for staff with inconsistencies. <b>The supervisor reviews the performance with the technologist, who signs.</b></li> <li>• Signed non-conformance form is retained in the employee’s annual competency folder.</li> <li>• <b>Employees with scores below 80% are removed from that bench until re-training is performed and competency demonstrated.</b></li> </ul> </li> </ol>
4	Inconsistencies are addressed through re-training. This may be on an individual or system level depending on the circumstances.

### F. System Administrators

Step	Action
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.

Step	Action
3	<p><b>Track Progress</b></p> <p>a. <b>View Status by Program under Manage Content</b></p> <ol style="list-style-type: none"> <li>1) Click 'Manage Content' button</li> <li>2) Select the folder (QDx at AHC Content) and Period from the drop down menu.</li> <li>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.</li> <li>4) Click on a Title to see list of employees who have completed and their scores.</li> <li>5) Once you select the training course, you will have the option to select "All Groups" in the Group dropdown to see the status of all staff members who were assigned the training course.</li> </ol> <p>b. <b>View Status by User under Manage Users (Example Addenda C)</b></p> <ol style="list-style-type: none"> <li>1) Click 'Manage User' button.</li> <li>2) Select the group you would like to view from the Group dropdown menu.</li> <li>3) Employees listed have assignments for the time period. System displays the number of assigned, number that have completed and average score. The employee score will be red if reset is required for any assignment.</li> <li>4) Click on an employee name to see list of assignment titles. Those that have been completed will display their score and date. Scores need to be reviewed and assessed as described previously in section C &amp; D above. Click the test score to display a list of questions; any that were incorrectly answered will be designated as such. The test can be reset from this screen.</li> </ol> <p>Note: The above are examples of how to assess and rest scores there are additional methods to accomplish this task.</p>

**G. Record Retention**

Step	Action
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 zeros 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
6	10/21/20	Section 5: Changed retention of non-conformance forms to annual competency folder	C Bowman-Gholston	R. SanLuis
7	1/6/21	Section 3: added quarterly check and discipline to management responsibilities Section 5: specified due dates for completion, added sharing answers is prohibited	L Barrett	R SanLuis
8	12/21/22	Header: Changed site to All Laboratories Footer: Changed SOP prefix to AHC	D Collier	R SanLuis
9	2/16/24	Section 5a & f: changed verbiage and added examples for clarity. Removed "Note" in 5a step 7 Section 5e: added "QA will" extract... Section 9: added Addenda C	R Sanluis S Codina	R SanLuis

**9. ADDENDA AND APPENDICES**

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



## Addenda A

Employee will request retake for training updates <80% and competency <100%.

**MTS** UNIVERSITY of WASHINGTON  
DEPARTMENT OF LABORATORY MEDICINE

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

## Addenda C

### Example Manage Users

**MTS** UNIVERSITY of WASHINGTON  
DEPARTMENT OF LABORATORY MEDICINE

Hello, Robert @ QDx at AHC | [My Account](#) | [Settings](#) | [Support](#) | [Logout](#)

My Assignments Training Library Lecture Library My CE Manage Users Manage Content

### Manage Users

**FILTER BY:**

GROUP(S)  
SGMC - Admin

PERIOD  
Previous year

PROGRAM  
QDx at AHC Content

SEARCH ALL GROUPS  
Search Name and Location

Only Deactivated Users  
 Only Users with Incomplete Assignments

Assign  Unassign  Notify  Add User  Edit Users  Deactivate User

	NAME	LOCATION	ASSIGNED	COMPLETE	AVG SCORE %	STATUS
<input type="checkbox"/>	<a href="#">Jonathan Amante</a>	Administrator	59	58	100	
<input type="checkbox"/>	<a href="#">Meaza Belay</a>	Administrator	70	69	99.5	
<input type="checkbox"/>	<a href="#">Cynthia Bowman-Ghols...</a>	Administrator	38	37	99.8	
<input type="checkbox"/>	<a href="#">Stephanie Coorna</a>	Administrator	69	68	100	
<input type="checkbox"/>	<a href="#">Demetra J Collier</a>	Administrator	49	48	100	
<input type="checkbox"/>	<a href="#">Hollie Genser</a>	Administrator	68	67	100	
<input type="checkbox"/>	<a href="#">Robert SanLuis</a>	Administrator	36	35	98.3	

### Click on Employee Name

**USER PROFILE**  
Robert SanLuis

Last Notified: May 15, 2022 05:12

FIRST NAME  
Robert

LAST NAME  
SanLuis

EMAIL/USERNAME  
robert.a.sanluis@questdiagn

LOCATION  
Administrator

PERMISSION LEVEL:  
Administrator

Request to revoke Admin permissions

GROUPS  
Select All Deselect All

FWMC - Phle/Proc  
 FWMC - Techs

PASSWORD  
\*\*\*\*\*

AUTO NOTIFY FREQUENCY  
Off

AUTO-NOTIFICATION EMAIL

PERIOD  
Previous year

Assign  Unassign  Notify  Reset Score

	PROGRAM	VERSION	ASSIGNED	DUE	COMPLETE	SCORE %	
[-]	QDx at AHC Content						
[-]	Competency Tests						
[-]	Technical Competencies						
	Hematology Consistency of Morphology 2023	07/01/2022	<input checked="" type="checkbox"/>				<input type="checkbox"/>
	UA & Body Fluid Consistency of Morphology 2023	07/01/2022	<input checked="" type="checkbox"/>				<input type="checkbox"/>
[-]	Documents						
[-]	Core Updates						
	Attendance Policy Update June 2023	07/31/2023	<input checked="" type="checkbox"/>	08/31/2023	12/22/2023	92	<input type="checkbox"/>
	BCID2 Planned Deviation for Pos QC (C. tropicalis)	12/20/2023	<input checked="" type="checkbox"/>	12/29/2023	12/22/2023	100	<input type="checkbox"/>
	BioFire Weekly and Monthly Maint update Nov 23	11/21/2023	<input checked="" type="checkbox"/>	11/30/2023	12/22/2023	100	<input type="checkbox"/>
	Planned Deviation Lav. Top Tubes	02/02/2022	<input checked="" type="checkbox"/>		06/21/2022	100	<input type="checkbox"/>
	Planned Deviation Sysmex QC Frequency Jan 2022	01/12/2022	<input checked="" type="checkbox"/>		06/21/2022	100	<input type="checkbox"/>
	QA 46 Equipment validations must incl. Maint & QC	11/10/2023	<input checked="" type="checkbox"/>	11/30/2023	12/22/2023	100	<input type="checkbox"/>