**Purpose**

This process provides description of the processes in place to effectively manage the Transfusion Services training assignments and documentation of training.

**Policy**

The HMC Transfusion Service Manager assigns adequate resources to perform, verify, and manage all training activities and competency performance in the Transfusion Service. Where necessary, the Transfusion Service collaborates with the Laboratory Medicine Department via Laboratory Medicine Training Coordinator, and the UWMC system.

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| **Responsibility** | The Transfusion Service Manager is responsible for:* Assigning a Training Coordinator
* Ensuring that trainers are vetted.
* Assigning trainers for initial and subsequent training.
* Reviewing training plans prior to training events.
* Identifying individuals for re-training, as indicated.
* Identifying the scope of training for process improvements.

The Training Coordinator is responsible for:* Performing the administrative duties required for Medtraining Systems (MTS) documentation of SOP and Form sign off
* Training the trainers prior to identified training events
* Reviewing training documentation
* Performing semi-annual audits of MTS sign off records.
* Maintaining Training Records for each TSL employee.
	+ - Primary Training Documentation for modules and SOPs
		- Secondary supporting documentation
		- Competency documentation
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| **Trainers** | The Transfusion Service identifies an adequate number of qualified individuals as trainers:* Training Coordinator
* Clinical Laboratory Technicians
* Medical Laboratory Technologists
* Quality Coordinator
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| **Trainer Qualifications**  | Trainers will be selected by the TSL Manager, Leads, and/or Training Coordinator based on the following:* Successful completion of 6 month assessments and direct observations
* Demonstrated knowledge of process and procedures in TSL
* Participation in development, validation, and implementation of process improvements in TSL
* Personnel provided by vendors for specific equipment training
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| **Initial and Subsequent Training** | The Transfusion Service identifies training needs based learning style assessment and job description. Training begins with a Learning Style Assessment completed by the trainee. * Assessment results are discussed with the trainer.
* Assessment results are utilized during training by all trainers to adapt training to the individual learning style.
* The Learning Style Assessment can be found at: [www.engr.ncsu.edu/learningstyles/ilsweb.html](http://www.engr.ncsu.edu/learningstyles/ilsweb.html)

Training for all employees includes:* Sunquest LIS
* Sample Receipt and Processing.
* Inventory Management
* Receipt, Storage, and Tracking of Cranial Bone Flaps
* Emergency Response
* Equipment Maintenance and Quality Controls
* Safety (in addition to the departmental training)
* Pre and Post Transfusion Testing
* cGMP and Quality Plan
* Downtime Processes

UW Laboratory Medicine provides a Lab Medicine Department orientation that is required for all staff hired to the department.Subsequent Training for process improvements will be delivered by trainers.* + Separated employees and employees who return from an extended leave of absence must complete refresher training consisting of all 6 month assessments, quizzes, direct observations and any new processes introduced in the employee’s absence.
	+ Complete retraining is required for all employees returning to HMC TSL after more than 6 months from their final day of work.
	+ Refresher training will be required for the following reasons:
* Leave of Absence ≥ 31 days but ≤ 6 months from their final day of work
* Separation/rehire timeframe ≥ 31 days but ≤ 6 months from their final day of work
* Outcome of Quality Improvement Monitoring
* Proficiency Testing Failure
* Failure to attain 80% on original training evaluation
* At the request of the employee.
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| **Training Software** | Medtraining Systems (MTS)* + The Transfusion Service Laboratory utilizes MTS for the documentation of SOP and form sign off completion
	+ MTS allows the assignment of specific documents based on employee job description.
	+ Knowledge evaluation questions will be added in MTS as appropriate.
	+ Employees have access to MTS on the internet.
	+ Reports of MTS assignment completions will be forwarded to the TSL Manager on the date of implementation.
	+ Full report of MTS safety assignment completion will be printed and audited for biannual completion
	+ As improvements to MTS are provided to the users, additional uses of MTS will be implemented in TSL.

Environmental Health & Safety* Bloodborne Pathogens
* Shipping with dry ice
* Shipping Biological Category B

The Learning Hub* University/Hospital based software
* Used for testing and tracking:
* HIPAA
* Fraud, Waste, and Abuse Prevention Training
* Medicare Billing
* Annual Compliance Training
* Annual Refresher Training

Microsoft Office* The Transfusion Service utilizes Microsoft Office for the creation, storage and distribution of competency related documents and quizzes.

Medialab* The Transfusion service utilizes MediaLab for acquiring, tracking, and applying continuing education credit.
* The Department of Laboratory Medicine uses MediaLab for safety manuals and department wide procedures
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| **Training Records** | The Transfusion Service and Laboratory Medicine Administration maintain training records for each employee.The following records are maintained and retained for those authorized to perform or review critical tasks:* Records of initial training, competency completion, and subsequent training
* Records of document review at initial training, and prior to implementation of any new or revised document.
* Records of semi-annual safety training
* Records of annual compliance training

Archived Training Records* Training Records will be retained per TSL Documents and Records Retention Policy.
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