

## Clinical Process Instruction Manual

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### Orientation – Clinical Staff Process Instruction

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#### Policy:

Trillium Gift of Life Network (TGLN) ensures that clinical employees are familiarized with the donation process and have the knowledge, resources and skills to perform competently in their clinical role.

Each new clinical employee is provided with a role-specific orientation. Orientation activities may include a combination of pre-orientation reading, theory presentation, observational experience, problem-based learning, simulation and preceptorship. These activities are documented in the training record, which consists of a Learning Management System (LMS) record, and a file on the Education drive. The Education and Professional Practice (EPP) Orientation Lead will be involved in the employee's assessment to determine when he/she is able to move from theory to independent practice while the direct Department Manager will assess the employee's clinical readiness to practice independently.

#### Process:

1. When preparing to send an offer letter to new staff in clinical services, the Department Manager consults with the EPP Department to determine existing or potential dates for orientation.
2. Human Resources or the department manager is responsible for ensuring that a copy of the employee's resume is provided to the EPP Orientation Lead to review and determine any special considerations for planning orientation (i.e. non-Registered Nurse in a Clinical Services Coordinator role).
3. EPP Orientation Lead reviews the position description on file with Human Resources, the general and the role-specific orientation, and key role-specific skills or competencies, and from this, generates an appropriate orientation schedule.
4. EPP Orientation Lead ensures:
  - 4.1 Role specific Human Resources, Health and Safety and Information System (IS) sessions are included in the orientation.
  - 4.2 A "welcome letter" and orientation package are generated for a new staff member. The letter and orientation package are sent whenever sufficient notice permits.
  - 4.3 A copy of the orientation schedule is shared with the Department Manager, upon request.
  - 4.4 Participants learning needs are assessed through class interaction, case studies, and/or quizzes. See Exhibit 1.
  - 4.5 Outstanding education needs or concerns are identified and discussed with the Department Manager and a follow-up plan for supporting ongoing learning needs is developed.

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4.6 Role specific orientation sessions are outlined in the Orientation Agenda. See Exhibit 2.

4.7 Internal candidates who are moving into a different clinical role internally, will have an assessment of appropriate orientation agenda items based on past experience and skill level.

4.8 Review of the role-specific theory covered during orientation with the employee.

4.8.1 For applicable roles, the employee will acknowledge receipt of theory, by signing the *Clinical Orientation Theory Record* ideally prior to leaving the classroom, which will be included in the employee specific education file. See Exhibit 3. If, for any reason, the *Clinical Orientation Theory Record* can not be signed prior to leaving the classroom or be submitted within 2-weeks of the class occurring, a Note to File will be placed in the employees records to explain the delay in obtaining the complete Clinical Orientation Theory Record.

4.8.2 For roles that receive orientation from a Clinical Specialist and where the *Clinical Orientation Theory Record* is not collected, readiness to practice is assessed between the Clinical Specialist and Department Manager. All related documentation and readiness to practice is to be reported to the Education and Professional Practice Department.

4.9 An orientation letter is forwarded to the Department Manager, with in a 3-week time frame, summarizing the orientation activities of the new employee. See Exhibit 4.

5. Prior to independent practice, the new staff member will submit an agreement of completion of the initial Clinical Process Instructions (CPI) that are expected to be read during orientation, as well as any competency quizzes and results that may be completed during orientation.
6. Clinical practical orientation is the responsibility of the Department Manager.
7. The preceptor(s), with whom the employee is placed with during clinical orientation, will provide, to the Department Manager, a clinical orientation practicum record, indicating the employee's ability to practice independently. See Exhibit 5.
8. Upon completion of clinical orientation the *Clinical Orientation Practicum Record*, or similar, will be scanned to the Department Manager and reviewed to determine his/her employee's readiness to practice independently or determine if an extension of orientation is required.
9. Confirmation of clinical readiness to practice is evidenced by a Department Manager's or delegate's signature on the *Clinical Orientation Practicum Record*, or similar.

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10. EPP will facilitate an electronic file storage for Department Managers to temporarily store confirmation of clinical completion upon Manager's satisfaction of employee to practice independently, until filed by EPP into employee specific file at regular intervals.
11. EPP encourages employees to complete an orientation evaluation during the orientation, which is used to improve the orientation process for future participants.

#### Records:

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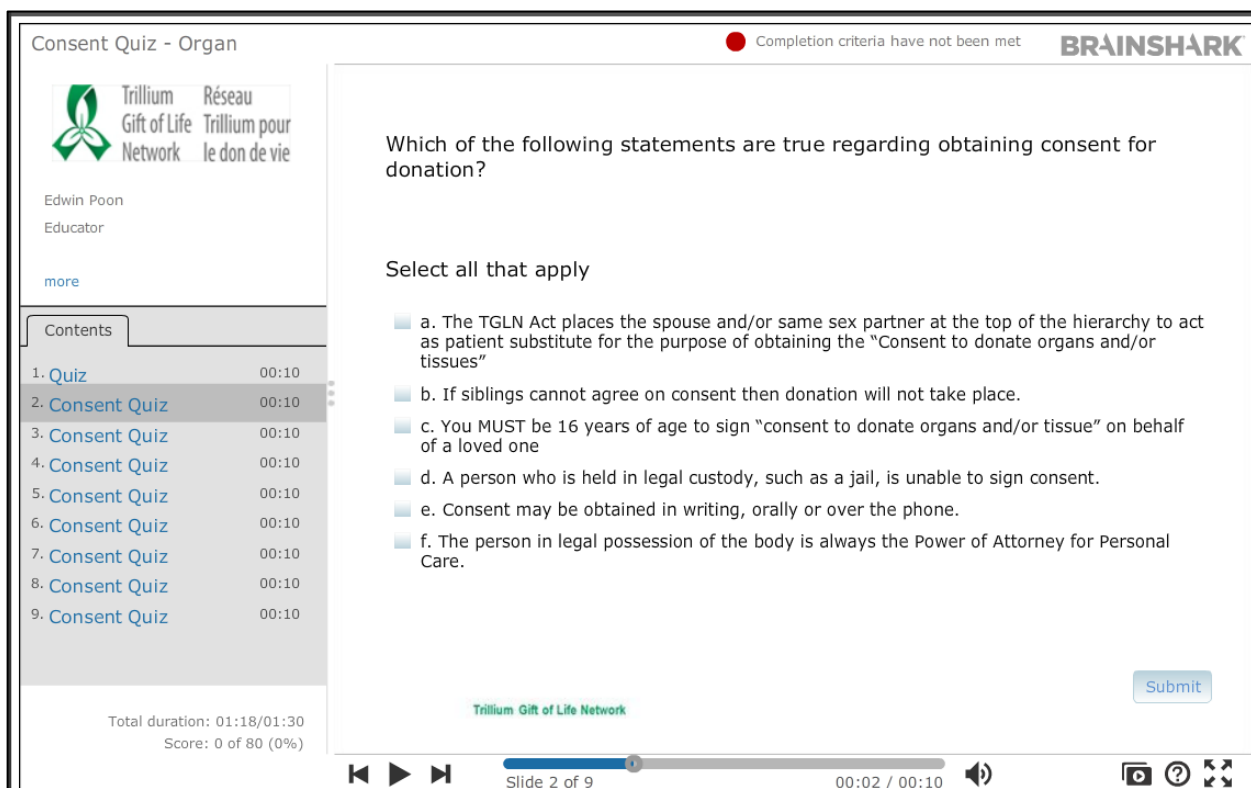
Record Name	Form No. (if applicable)	Record Holder	Record Location	Record Retention Time (as a minimum)
Resume	-----	Education and Professional Practice Department	Employee electronic file	16 years after employee has left organization
Orientation Competency quiz	-----	Education and Professional Practice Department	Learning Management System	16 years after employee has left organization
Orientation agenda	-----	Education and Professional Practice Department	Employee electronic file	16 years after employee has left organization
Clinical Theory record	-----	Education and Professional Practice Department	Employee electronic file	16 years after employee has left organization
Orientation Activities Summary Letter	-----	Education and Professional Practice Department	Employee electronic file	16 years after employee has left organization
Clinical Orientation Practicum record	-----	Education and Professional Practice Department	Employee electronic file	16 years after employee has left organization

- No references.

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#### Exhibit 1: Sample Orientation Competency Quiz



The screenshot shows a quiz interface with the following elements:

- Header:** "Consent Quiz - Organ" and "Completion criteria have not been met" with a red dot. The "BRAINSHARK" logo is in the top right.
- Logo:** Trillium Gift of Life Network / Réseau Trillium pour le don de vie.
- Author:** Edwin Poon, Educator.
- Contents Table:**

Item	Duration
1. Quiz	00:10
2. Consent Quiz	00:10
3. Consent Quiz	00:10
4. Consent Quiz	00:10
5. Consent Quiz	00:10
6. Consent Quiz	00:10
7. Consent Quiz	00:10
8. Consent Quiz	00:10
9. Consent Quiz	00:10
- Question:** "Which of the following statements are true regarding obtaining consent for donation?"
- Instruction:** "Select all that apply"
- Options:**
  - a. The TGLN Act places the spouse and/or same sex partner at the top of the hierarchy to act as patient substitute for the purpose of obtaining the "Consent to donate organs and/or tissues"
  - b. If siblings cannot agree on consent then donation will not take place.
  - c. You MUST be 16 years of age to sign "consent to donate organs and/or tissue" on behalf of a loved one
  - d. A person who is held in legal custody, such as a jail, is unable to sign consent.
  - e. Consent may be obtained in writing, orally or over the phone.
  - f. The person in legal possession of the body is always the Power of Attorney for Personal Care.
- Footer:** "Trillium Gift of Life Network" logo, "Submit" button, and a progress bar showing "Slide 2 of 9" and "00:02 / 00:10".




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 ISSUE DATE: July 05, 2010  
 ISSUE.REVISION: 1.8  
 REVISION DATE: March 29, 2023  
 APPROVED BY: Professional Practice Authority

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#### Exhibit 2: Sample Orientation Agenda



Promoting Excellence in Donation  
Through Hospital  
Education & Skills Training

## Trillium Gift of Life Network

Organ and Tissue Donation

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**On-Call Orientation Program September 2010**

**Monday September 27<sup>th</sup>, 2010**

**Location: Corner Meeting Room**  
**Attendees: Jessica(Thunder Bay), Merica**

Time	Topic	Facilitator
1100-1115	Introduction & Welcome Orientation Format and Resources	Kim Brenda Janice Beitel-Professional practice Leader Cynthia Isenor-Educator Robert Sanderson- Manager
1115-1230	TGLN "Basics" and Clinical Roles	Cynthia
1230-1315	Lunch	
1315-1400	Overview of Donation Process- Case Study	Kim
1400-1500	Identification & Referral of Potential Deceased Donors Algorithm <b>Donor Assessment Form Intro</b>	Brenda
1500-1515	Break	
1515-1530	ORC exercise	Brenda
1530-1545	Occ Health Get information on N95 mask fit	Brenda
1545-1615	Infection Control	Kim
1615-1700	<b>Watch the CCDT NDD Video</b>	

\*Return:  
 DVD  
 SOP Checklists  
 Accessibility Checklist


C:\Documents and Settings\bowmank\Desktop\CPI Exhibit 1.doc

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#### Exhibit 3: Sample Employee acknowledgement of receipt of Theory Orientation

 <p style="text-align: center;"><b><i>Clinical Orientation Theory Record</i></b></p> <p>Employee Signature: _____          Educator Signature: _____          Completion Date: _____</p>	<p><b>DONOR CASE MANAGEMENT</b></p> <p><b>1. Donor Identification &amp; Timely Referral</b></p> <ul style="list-style-type: none"> <li>a) Referral of all deaths to the Provincial Resource Centre as part of “Routine Referral and Connect” legislation ✓</li> <li>b) Promotion of HCP referral prior to setting time to WLS ✓</li> <li>c) Key assessment information             <ul style="list-style-type: none"> <li>- Ventilator status/parameters ✓</li> <li>- Cause of death/mechanism of injury</li> <li>- Medical history – past &amp; current hospital course</li> <li>- ABO (Blood type) ✓</li> <li>- Height/weight</li> </ul> </li> <li>d) Absolute exclusion criteria and ✓</li> </ul>	
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#### Exhibit 4: Sample Orientation Summary Letter to Department Managers

Department Manager: \_\_\_\_\_

This is to advise that **XXXXXX** has completed the theory portion of the TGLN role specific orientation as of **XXXXXX**. This includes demonstration of sleeving, scrubbing, and gloving. This includes completion of the updated Certification Assessment quiz from the Eye Bank of Canada. During the theory portion of orientation, Education & Professional Practice has not identified any other areas for follow up at this time.

The next stage of orientation entails buddying with a TRC for recovery cases. Professional Education and Practice has no further sessions and you or **XXX** are responsible for identifying any further needs to Professional Practice. Please advise me when buddy shifts are completed and independent practice is scheduled, so I can place this information in the file. Please include any assessments by staff to determine the ability of the staff member to practice independently. A reminder: Brainshark CPI Signoff must be completed prior to independent practice.

This letter will be filed in the employee training file and may be viewed at any time upon request.

Education: \_\_\_\_\_


Date: \_\_\_\_\_



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#### Exhibit 5: Sample Clinical Orientation Practicum Record for Clinical Staff

	Learning Content	Observed ✓	Performed ✓	Comments (Note: if not 'performed', employee must state understanding of principle)
<p align="center"><i>Clinical Orientation Practicum Record</i></p> <p>Employee Name: _____            Manager Signature: _____            Orientation Start Date: _____            Orientation Completion Date: _____</p>	<b>Donor Management System(i-transplant)</b>			
	<ul style="list-style-type: none"> <li>- Demonstrates use of TGLN-issued blackberry</li> <li>- Obtains permanent password for iTransplant</li> <li>- Logs on independently</li> <li>- Demonstrates using label maker and scanner</li> <li>- Knows how to access IT on call for trouble shooting</li> <li>- Articulates understanding of privacy related to documentation and X1 device</li> <li>- Enters key information from chart review into DMS in a timely fashion</li> <li>- Demonstrates ability to upload and scan documents into iTx system (e.g. consent, NDD form)</li> <li>- Understands appropriate access for remote desktop login (e.g. tango vs. vmh)</li> </ul>			