

Clinical Process Instruction Manual

Tissue Program Clinical Training Process Instruction

Policy:

All tissue clinical positions have a training profile that is made up of curricula that, combined with their job description, indicates the functions they perform and the training required.

Trillium Gift of Life Network (TGLN) Tissue Program management and Education and Professional Practice are responsible for maintaining training profiles for each position and putting together a curriculum that supports the functions staff are responsible for performing.

Education and Professional Practice, in conjunction with Tissue Program management, are responsible for the coordination and management of training activities such as:

- new employee orientation
- annual training
- process changes
- continuing education
- effectiveness checks
- facilitate development of training materials / content.
- maintain employee training records (in conjunction with management and employees); and periodically report on training compliance.

The Managers, Tissue and Clinical Specialists are responsible for competency assessments

- collaborating with Education and Professional Practice to develop and maintain training plans and curricula relative to positions under their management
- approving new and revised training plans for employees under their management
- training or assuring training of employees under their management according to this procedure
- ensuring completeness and accuracy of records associated with the training program
- making staff aware of the consequences of the improper performance of their specific jobs
- making personnel who perform verification and validation activities shall be made aware of accidents and errors that may occur and be encountered as part of their job function

Clinical employees are responsible for understanding the requirements of their training plans; participating in training when required; completing training by due date and; managing their documentation for the completion of training.

Training records shall be retained for a minimum of 16 years after termination of employment.

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Process:

1. The purpose of this process instruction is to describe the Tissue Program employee training system and documentation of training. Employee training is intended to assure all personnel have the necessary education, experience, and training to ensure competent performance of their assigned functions and familiarity with applicable regulations and standards.

Training Overview

2. There are three prescribed components of the initial orientation and training of new Tissue Program clinical staff: new employee clinical orientation, Clinical Process Instruction (CPI) training, and on-the-job (OJT) training.
3. Training methods and resources may include but are not limited to:
 - didactic/classroom: TGLN has several orientation courses for new employees and conducts other training that is didactic in nature.
 - online courses: self-administered online courses are used to train in various topics.
 - read and understand: procedures performed by employees must be read and employees must sign to indicate comprehension.
 - skills/role specific training: individual training is used to train employees to perform tasks requiring discussion, demonstration, observation, performance under supervision, or similar individual-based training.
 - periodic skills assessment: individual training may be used to periodically assess employees' ability to perform tasks requiring observation / performance under supervision / demonstration of proficiency.
 - quality assurance and electronic systems training
 - other training: other training may include staff meetings, attendance to professional association meetings, ad-hoc training, virtual and in person instructor-led training, etc.
4. Training is documented using a combination of electronic and paper records.

TGLN Orientation

5. All Tissue Program staff participate in the TGLN orientation upon hire. Clinical staff attend a role-specific clinical orientation, while non-clinical staff attend a general orientation. The TGLN orientation is coordinated, conducted, and documented by the Education and Professional Practice department. Clinical orientation is conducted during the first week of employment for clinical staff, while a general orientation is usually conducted within the first three months for non-clinical staff.

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Documentation of the completion of the clinical orientation is provided to the manager of the functional area and filed in the employee's training record which is maintained by Education and Professional Practice.

6. New employees receive an orientation program that includes meetings with support departments, reading and acknowledging comprehension of procedures, online seminars, TGLN orientation courses, role specific training, and orientation progress checks.
7. Documentation at the time of orientation includes the orientation grid for new clinical hires describing the subjects covered during initial orientation, CPI read and understand checklist, and written quizzes and/or competency assessments administered throughout the orientation program on specific topics. These shall be filed in the training records.
8. Employees receive continuing education on an ongoing basis in a variety of forms including but are not limited to annual procedure reviews, process changes, TGLN provided training, and external training such as professional association education, etc.
9. Periodic skills assessments may be applicable to certain functions to assure proper performance.
10. Employees are trained when processes related to their functions change, in addition to the first time they are exposed to a process.

Training Profiles and Plans

11. Training profiles are guiding documents that outline the training requirements for Tissue Coordinators, see Exhibit 1, and Multi-Tissue Recovery Coordinators see Exhibit 2 sample. The training profile may include but is not limited to:
 - orientation meetings with support departments such as Finance and Human Resources (HR);
 - reading of applicable controlled documents (e.g., process instructions and forms) and acknowledgement of comprehension;
 - completion of online or other self-guided learning media;
 - attendance to instructor-presented sessions;
 - completion of core competency checklists;
 - progress checks during orientation period;
 - annual skills/competency assessments; and
 - other training tasks.



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12. Training plans are utilized as follows:

- 12.1. Managers and/or Clinical Specialists and Education and Professional Practice use the training plans, see Exhibit 1 and Exhibit 2, as guiding documents for the respective roles to set the role expectation and requirements to pass competency or orientation. This plan will assist in guiding the employee on what type of activities/components are a requirement of the role.
- 12.2. Managers and/or Clinical Specialists must approve training plans and changes to training plans. It is the responsibility of the manager and/or Clinical Specialist to make employees aware of their training requirements and coach them as necessary.

New Employees

13. HR will notify department leads (i.e., Tissue Program, Education and Professional Practice, Information Services, Payroll etc.) of a new employee upon acceptance of the employment offer.
14. The new employee will be assigned a training profile as per the job role.
15. For new positions, the new employee's management shall work in conjunction with Education and Professional Practice to develop a customized training profile.
16. The new employee is responsible for completing the tasks as indicated on the training profile as well as any additional training that may be assigned on an individual basis.

Initial Training to Clinical Process Instructions

17. There are lists of required CPI reading for each of the positions of Tissue Program staff. These lists are maintained by Education and Professional Practice, and reviewed annually by the manager or designate of the specific functional area (donation or recovery). New Tissue Program staff are instructed in the location of all TGLN and Tissue Program's CPIs and the accessing of these CPI's electronically. CPI read and understand sign off coincides with orientation, where staff are expected to have completed the initial review of all applicable policies prior to OJT. Practical training to specific job tasks occurs during OJT, many of the CPIs are required reading for training of specific job tasks and require re-reading.
18. For practices and forms related to OJT, please refer to the *On-The-Job Training - Clinical Staff Process Instruction, CPI-9-961*.



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Training Records

19. Training records shall include the following items:

- a training checklist for new employees or employees with newly assigned tasks;
- delineation of functions that employees are authorized and trained to perform;
- documentation of review and training prior to implementation of new and/or revised CPIs;
- annual review of policies and procedures for which the employee has been trained, including safety precautions;
- annual attendance at hazardous materials training; and
- attendance at workshops, seminars, meetings or other continuing education programs.

Records:

Record Name	Form No. (if applicable)	Record Holder	Record Location	Record Retention Time (as a minimum)
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No records

References:

- Standards for Tissue Banking, American Association of Tissue Banks, United States, 14th edition, 2017. J2.100 and J2.400.
- *On-The-Job Training - Clinical Staff Process Instruction, CPI-9-961.*



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Exhibit 1: MTRC Training Profile – Sample Page 1



MTRC Training Profile

Position: Multi Tissue Recovery Coordinator	
Training Requirements	<input type="checkbox"/> Orientation-Ocular <input type="checkbox"/> Orientation-Multi Tissue x 2 weeks <ul style="list-style-type: none"> o Orientation-Circulator Training x 1 day o Hands-on training with Clinical Specialist – R&T Skin, HV, MS and Osteochondral recovery when available X 3 days <input type="checkbox"/> Preceptorship: requires – <ul style="list-style-type: none"> o Training shifts with multi tissue team <ol style="list-style-type: none"> 1. Minimum 3 Skin recoveries 2. Minimum 3 HV recoveries 3. Minimum 3 MS recoveries 4. Minimum 3 Osteochondral recoveries *Exceptions depending on individual skill level and previous experience <input type="checkbox"/> Minimum requirements for independent practice– Skin and MS recovery sign off <input type="checkbox"/> Progress Checks (during preceptorship): requires minimum 1 check-in <input type="checkbox"/> Retraining (requires reason): _____ <input type="checkbox"/> Annual Competency <ul style="list-style-type: none"> <input type="checkbox"/> Circulator in Recovery <input type="checkbox"/> HV Pericardium Descending Aorta <input type="checkbox"/> Musculoskeletal Recovery <input type="checkbox"/> Osteochondral (En bloc) Recovery <input type="checkbox"/> Pre-Recovery/Post-Recovery and Safety <input type="checkbox"/> Skin Recovery <input type="checkbox"/> Team Lead Training (if applicable) <input type="checkbox"/> Annual Safety Training <input type="checkbox"/> Corporate Policies <input type="checkbox"/> HR and Safety Videos (Brainsark/Dual Code)
Required Reading	1. Clinical Process Instructions: Donor Referral & Intake CPI-9-100 Ontario Organ or Combined Organ and Tissue Donation CPI-9-160 Ontario Tissue Exclusive Referral Donation Donor Assessment, Screening, Suitability and Testing CPI-9-203 Coroner’s Case CPI-9-207 Donor Medical and Social History – Organ or Combined Organ & Tissue CPI-9-208 Donor Assessment – Combined Organ and Tissue CPI-9-209 Physical Exam - Organ or Combined Organ and Tissue Donors CPI-9-220 Hospital Profile CPI-9-210 Hemodilution Calculation CPI-9-261 Medical and Social History-Tissue CPI-9-262 General Tissue Donation Criteria and Contraindications



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Exhibit 2: Tissue Coordinator Preceptorship Training Plan – Sample Page 1



TISSUE COORDINATOR PRECEPTORSHIP TRAINING PLAN 2024

Orientation/training shifts with assigned preceptor are categorized from Phase 1 to Phase 5: NOTE: plan has been modified to facilitate remote training of new Tissue Coordinators working from home	
ITX ORIENTATION	ITRANSPLANT (ITX) ORIENTATION
	<ul style="list-style-type: none"> ✓ 3 days in Orientation ✓ Review of all applicable fields as well as entry format as per <i>iTransplant: Tissue Exclusive Manual</i> (SharePoint) ✓ Practice entering referrals and completing consent form, coroner permission form, DRAI in <i>iTransplant</i> training site
PHASE 1	First shift: OBSERVATION (DAY 1 in PRC)
	<ul style="list-style-type: none"> ✓ 1st shift trainee observes preceptor – “a day in the life of a Tissue Coordinator” ✓ Trainee enters referrals in <i>iTransplant</i> training site in real-time
PHASE 2	Next 5 shifts: REFERRAL INTAKE and SUITABILITY SCREENING (DAY 2, 3, 4, 5, 6)
	<ul style="list-style-type: none"> ✓ TCs to transfer RNRs to ensure the trainee can practice referral intake for different types of referrals; coroner, paramedic, MA/D, first person or family ✓ Assess medical suitability on taken referrals; MU based on age, MU based on contraindicators, over 80, 76-79 yrs., suitable for multi tissue or eyes only ✓ 5th shift – trainee should demonstrate a completed RNR (referral worksheet and donor screening w/ suitability and faxing the HBF)
CONSENT WORKSHOP	1-Day Consent Workshop
	<p>Workshop highlights:</p> <ul style="list-style-type: none"> ✓ <i>iTransplant</i> overview ✓ Approach Plan Preparation ✓ Dual Advocacy with Value Positive Principles ✓ Scripting Exercises
PHASE 3	Next 6 shifts: APPROACHING, CONSENT, and MED/SOC (DAY 7, 8, 9, 10, 11, 12)
	<ul style="list-style-type: none"> ✓ Day 6 – Trainee will witness any consent from TCs on shift and listen in on any approaches taking place that same shift; Trainee will approach as of day 7 ✓ Once trainee has completed the approach, consent and UDRAI, the preceptor will take over to show trainee the next steps ✓ If consent was declined, the preceptor will show trainee the next steps until they determine trainee can complete next steps independently
MULTI-TISSUE (MT) WORKSHOP	2-Day MT Workshop (with Multi-Tissue Certification issued post completion)
	<p>Workshop highlights:</p> <ul style="list-style-type: none"> ✓ Medical and Social History Questionnaire ✓ Multi-Tissue Exclusion Criteria ✓ Multi-Tissue Assessment (Case Practice) ✓ Accepting Multi-Tissue and Next Steps ✓ Screening Checklist (Tissue Cases only) ✓ <i>iTransplant</i> Documentation ✓ Tissue-on-Call ✓ Medical Consults and Tissue Consults ✓ Recovery Coordination for MT cases ✓ Shift Report