

## Clinical Process Instruction Manual

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### Quality Staff - Tissue Training and Continuing Education Process Instruction

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#### Policy:

Trillium Gift of Life Network (TGLN) maintains job descriptions for all positions within the organization. Copies of job descriptions may be obtained by authorized individuals through the Human Resources (HR) Department. Job descriptions provide detailed information on the duties and responsibilities of the Quality Department staff. Additionally the job descriptions provide a list of minimum and preferred qualifications required for each position.

Quality Specialists (QS), Quality Compliance Coordinators (QCC), Quality Chart Reviewers (QCR) and Quality Documentation Coordinator (QDC) are responsible for carrying out duties associated with quality assurance.

#### Process:

##### Initial Employee Training

1. Each new employee to the Quality Department is given an *Orientation Schedule and Training Accomplishments Checklist* which outlines their learning objectives. See Exhibit 1. The Director Quality or designate uses this checklist to ensure the new employee receives all necessary training to perform their job effectively.
2. The Director Quality or designate documents the completion of training on the *Quality Staff Training Record*. See Exhibit 2.
3. Core elements of the overall training program are listed below. A specific orientation training plan for an individual is developed by the Director Quality or designate for each role from this list.
  - review of all applicable Quality/Clinical Documentation
  - review of all applicable legislation, regulations, standards and guidelines
  - introduction to documentation management processes
  - introduction to the chart auditing process and qualification requirements in order to be independent in chart auditing activities (including the exceptional distribution process).
  - introduction to the internal audit process
  - introduction to projects
  - introduction to incident investigations

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- introduction to the lesson learned log and corrective actions process
  - introduction to quality led education of clinical staff
  - introduction to the telephone consent and medical and social history questionnaire auditing
4. In the event new job functions are added to an existing employee, initial training will be given by the Director Quality or designate and documented in the employees training record.

#### **Review and training to new and/or revised policies, procedures and process instructions**

5. Prior to new and/or revised policies, procedures and process instructions being implemented, Quality staff perform a read and understand process. Records of this activity are maintained by the Quality Department.

#### **Annual review of policies, procedures and process instructions**

6. On an annual basis, each quality staff member will review documents identified as pertinent to their designated function. A copy of this review will be maintained in their training record.

#### **Continuing Education**

7. Continuing education can consist of attendance of workshops, seminars, meetings or other continuing education programs. Continuing education is optional for Quality Staff and documentation of attendance will be maintained by each staff member in their training record.

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#### Records:

Record Name	Form No. (if applicable)	Record Holder	Record Location	Record Retention Time (as a minimum)
Quality Department Staff Training Record	--	Quality Department	Quality Department	16 years after the date of employee termination

#### References:

- *Standards for Tissue Banking, American Association of Tissue Banks, United States, 14th edition, 2017. J2.000.*

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#### Exhibit 1: Sample Orientation Schedule and Training Accomplishments Checklist

Quality Chart Reviewer - Tissue  
 Orientation Schedule and Training Accomplishments Checklist

Week 1

Day 1

- HR orientation
- Office tour – including PRC and Recovery Supply Rooms
- Receive orientation on where to find audit materials and a copy of the Quality Analyst – Tissue Manual
- Introduction to iTransplant with initial training and submission of access request to Service Desk
- Copy of Health Canada Regulation Guidelines
- Copy of AATB Standard
- Copy of tissue chart audit tool
- Intro to ORC

Day 2

- Review of the chart audit tool and going through a previously audited chart
- Assignment of 4 more previously audited charts to audit and compare with the audit tool filled out by an incumbent Quality Analyst – Tissue
- Assignment of Quality QSP and QPIs to review
- Assignment of referral CPIs to review

Day 3

- Continue with auditing charts and getting more familiar with iTransplant
- Go over assigned documents
- Assignment of donor assessment CPIs to review

Day 4

- Continue with auditing charts and getting more familiar with iTransplant
- Go over assigned documents

Day 5

- Continue with auditing charts and getting more familiar with iTransplant
- Introduction to Tissue Chart Amendments process and SharePoint

Week 2

- Review of Quality Analyst – Tissue Manual
- Review of Health Canada Regulation Guidelines
- Review of AATB requirements
- Introduction of CSA standards (General and Tissue)
- Review of previously audited charts (providing feedback)
- Start of auditing current charts, with each one reviewed prior to sending amendments (5 charts)
- Assignment of Recovery CPIs for review

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#### Exhibit 2: Sample Quality Staff Training Record



Quality Compliance Coordinator and Quality Chart Reviewer  
 Training Record

Name of Trainee: \_\_\_\_\_

Position: \_\_\_\_\_

Learning Content	Theory	Applied	Comments
<b>DONOR MANAGEMENT SYSTEM (iTRANSPLANT)</b>			
<b>QUALITY ANALYST IS ABLE TO NAVIGATE AND OBTAIN INFORMATION FROM ALL RELEVANT TABS</b>			
- Organ Chart Tabs: Tracking, Organ Pre-OR, Organ OR/POST: Able to find pertinent information for Organ charts			
- Tissue Chart Tabs: Tracking, Tissue Recovery, Eye Recovery: Able to find pertinent information for Tissue charts			
- Notes tab: Uses the Notes tab to search for any pertinent information			
- Attachments: Quality Analyst is able to download/view required documents and upload changed documents (i.e. adding the TGLN number to an attachment)			
- Navigates "Find Cases" function to find pertinent cases for auditing			
<b>CHART AUDITING</b>			
<b>QUALITY ANALYST IS FAMILIAR WITH TGLN'S AUDIT TOOLS AND ABLE TO AUDIT THE FOLLOWING AUDIT TYPES</b>			
- Organ Charts			
- Tissue Charts – Ocular			
- Tissue Charts – Multi-Tissue			
- Telephone Consent and Medical & Social History Questionnaire audits			
<b>SHAREPOINT – TRACKING CHARTS AND SENDING AMENDMENTS</b>			
<b>QUALITY ANALYST IS ABLE TO NAVIGATE AND USE ALL RELATED ASPECTS OF THE SITE</b>			
- Enter donor charts			

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