Waived POCT Trainer Competency Checklist

Name: _____   **JHED ID:** _____

Department: _____   **Date:** _____

I.   **Obtain Current Year e-Learning Course Certificate(s) for each applicable Point of Care Test the Trainer will instruct.**

II.   **Review Key Elements of Applicable Test Procedure(s) with Trainer**

a.   Equipment requirements
b.   Reagent storage and stability requirements
c.   Specimen requirements
d.   Safety requirements
e.   Quality Control frequency
f.   Quality Control procedure
g.   Quality Control failures and corrective action
h.   Documentation of Quality Control results
i.   Patient testing, including CSN discussion
j.   Documentation of patient results
k.   Reference range(s)
l.   Interpretation of results
m.   Limitations of testing
n.   Handling of abnormal results/critical action values
o.   Analyzer Maintenance and Troubleshooting

Notes:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

III.   **Observe the Trainer Perform Quality Control**

a.   *NOTE: All steps must be performed according to the SOP in order for competency to be determined adequate for training others.*

IV.   **Review Regulatory Operator Competency Requirements**

a.   Waived Testing falls under the purview of Joint Commission
  i.   *Initial Competency* must be completed for all new testing personnel by an authorized trainer, Point of Care Coordinator (POCC), or Nurse Educator.
  ii.   *Annual Competency* is assessed for *all* operators, including Nurse Educators and trainers, using at least two of the following methods:
    1.   Performance of a blind specimen.
    2.   Periodic observation of routine work by an authorized trainer, POCC, or Nurse Educator.
    3.   Monitoring of each user's Quality Control performance.
    4.   Passing a written test specific to the test assessed.

b.   Documentation of Operator Competency
  i.   Written Procedures in Conjunction with Operator Skills Checklist:
    1.   Assists Trainer in discussing key elements of procedure and analyzer operation.
    2.   Provides a direct observation/self-assessment checklist.
    3.   Captures acknowledgement documentation of adequate training, understanding of the relevant SOP(s), and completion of observed QC with feedback as needed.
  ii.   Self-Study Packet:
    1.   Tip sheet with answers to frequently asked questions and observed issues.
    2.   Highly recommended for review by all staff.

V.   **Review Trainer's Responsibilities: Initial Training**
  a.   Trainer ensures new employee has been assessed for color blindness, as applicable by test.
  b.   Trainer assigns or assists new employee to locate applicable e-Learning course(s).
        i.   *NOTE: Certificate of completion must be provided to Trainer <u>prior</u> to hands-on training.*
  c.   If blood collection is required, review skills and assess new employee on collection procedure(s).
  d.   New hires are added by the POCT Office into Telcor; initial training must be completed within two weeks of their start date <u>and</u> prior to testing patients.
  e.   During the hands-on training session, the Trainer will:
        i.   Review the key elements of the test procedure, referring to the applicable procedure(s) in HPO.
        ii.   Demonstrate the procedure to the new employee.
        iii. Allow the new employee to practice the procedure, as needed.
        iv.   Directly observe the new employee performing the procedure to assess whether training was successful.
        v.   Immediately correct any performance problems in a respectful manner.
        vi.   Explain how to properly record QC data on log sheet and document corrective action, as applicable.
        vii. Observe recording of manual QC results on the Operator Skills Checklist, as applicable.
        viii. Complete all required sections on the Operator Skills Checklist, confirming document completion.
  f.   Both the trainer and new employee must sign and date the Operator Skills Checklist upon completion of successful training.
        i.   Original Skills Checklist and e-Learning Certificate filed in employee personnel files.
        ii. A copy of the Skills Checklist and the test-specific e-Learning Certificate *must* be sent to the POCT Program Office.
             1.   **Fax: *410-502-2232* <u>or</u> Scan and Email: *POCTGroup@exchange.johnshopkins.edu***

VI.   **Review Trainer's Responsibilities: Ongoing Competency of Staff for Manual Kit Tests**
  a.   Trainer ensures all staff complete the applicable e-Learning course(s) on an annual basis.
  b.   Trainer conducts a Skills Day(s) for staff to complete QC performance requirement for manual tests.
        i.   Analyzers with data management capabilities automatically capture QC results.
  c.   Trainer observes staff document QC results on Annual POCT Manual Testing Competency form.
  d.   Trainer evaluates QC results for acceptability and signs form.
        i.   Original annual QC documentation filed in employee personnel files.
        ii. A copy of all annual QC documentation *must* be sent to the POCT Program Office.

VII. **Review Trainer's Responsibilities: Ongoing Competency of Staff for Waived Tests on Analyzers**
  a.   Trainers receive notices of testing personnel expirations if Competency Requirements have not been satisfied.
        i.   All staff must complete the applicable e-Learning course(s) and both levels of QC on an annual basis.
  b.   Trainers will be responsible for re-training all testing personnel who expire at the end of a given competency cycle and submitting proof of retraining to the POCT Office.

VIII. **Review POCT Office Responsibilities**
  a.   POCCs are responsible for technical oversight of all point of care testing, to include development of SOPs, quality control programs, logs, and training materials, among others.
  b.   POCCs serve as technical consultant for all technical problems related to all point of care testing.
  c.   Program POCC evaluates Unit Trainer competency and monitors all Testing Personnel competency for compliance with regulatory requirements.
  d.   Program POCC conducts 'refresher' sessions with trainers as determined by the POCT office.
  e.   POCCs conduct regular unannounced audits to assess unit compliance with all federal, state, and other accreditation requirements.
  f.   POCCs send Patient Exception, Meter Not Connecting, and Certification Queue emails to unit designees.

IX. **Point of Care Resources**
  a. Point of Care Testing Program Website: **pathology.jhu.edu/department/staff/POCT/home.cfm**
      i. Procedures
      ii. QC Log Sheets
      iii. Educational Materials (Self-Study Packets, Operator Skills Check Sheets)
      iv. Emergency Barcode Form
  b. Point of Care Testing Procedures: **https://hpo.johnshopkins.edu/hopkins/**
      i. JHH Hospital Clinical Manuals → Pathology Volume I – POCT and Phlebotomy/Specimen Collection
  c. Contact Us:
      i. **Office Hours: M-F 7:00-16:00**
          1. Phone: 410-955-2645
          2. Fax: 410-502-2232
          3. Email: POCTGroup@exchange.johnshopkins.edu
      ii. **After Hours (24/7 call coverage)**
          1. CORUS: Pathology Staff – POCT Consult
          2. CORUS: Pathology – POCT 911 Barcode

Notes: _____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

The signatures below attest to the completion of a trainer session, during which all of the above information was discussed and any questions and/or concerns were addressed. The trainer agrees to train new staff and assess ongoing competency following the guidelines presented herein, referring to the Point of Care Testing Office as needed for assistance.

This employee is approved as a Trainer for the following Point of Care Test(s):

Glucose		Manual hCG		Fecal Occult Blood	
Clinitek – Dipstick UA		**Gastric pH**		**Rapid HIV**	
Clinitek – Clinitest hCG		**pH Hydrion**		**Rapid HCV**	
Afinion HbA1c		**pH Nitrazine**		**Strep**	
Hemocue		**Gastroccult**		**Urine Drug Screen**	
GeneXpert Xpress		**LumiraDx SARS-CoV-2 Ag**		**Accula SARS-CoV-2 Ab**	

Trainer Signature: _____   **Date:** _____

POCC Signature: _____   **Date:** _____

All individuals who would like to become a POCT trainer must undergo this training initially
and at a frequency at the discretion of the POCT Office.   Revision: 09/2021