 Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 1 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	
Prepared by QA Committee		
Issued by: Laboratory Manager	Revision Date:11/23/2023	
Approved by Laboratory Director: Microbiologist-in-Chief	Next Review Date:	

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## ORIENTATION FOR TECHNOLOGISTS AND TECHNICIANS TABLE OF CONTENTS



<b>WELCOME TO THE UHN/MSH DEPARTMENT OF MICROBIOLOGY .....</b>	<b>5</b>
<b>LABORATORY TRAINING .....</b>	<b>8</b>
ORIENTATION .....	8
BACTERIOLOGY AND VIROLOGY TRAINING.....	11
PROBATIONARY PERIOD REVIEW .....	11
<b>DEPARTMENT STRUCTURE &amp; CULTURE - MANAGER .....</b>	<b>12</b>
<b>DEPARTMENTAL ISSUES-CHARGE TECHNOLOGIST .....</b>	<b>13</b>
<b>DEPARTMENTAL SAFETY ISSUES - SAFETY TECHNOLOGIST / INFECTION CONTROL PRACTITIONER .....</b>	<b>14</b>
Handling and Processing of Specimens from Patients with Suspected or Documented Viral Hemorrhagic Fever Training Checklist .....	15
<b>QUALITY MANAGEMENT SYSTEM TRAINING .....</b>	<b>17</b>
<b>INFORMATION SYSTEMS TRAINING.....</b>	<b>18</b>
<b>CHARGE TECHNOLOGIST TRAINING .....</b>	<b>20</b>
<b>QUALITY ASSURANCE TECHNOLOGIST TRAINING .....</b>	<b>24</b>
PARADIGM DOCUMENT CONTROL SYSTEM – General User.....	28
PARADIGM DOCUMENT CONTROL SYSTEM – Expert User.....	30
<b>SENIOR TECHNOLOGIST TRAINING .....</b>	<b>32</b>
General Accessioning .....	34
ARIES® <i>C. difficile</i> Testing .....	36
ARIES® HSV and VZV Testing by Luminex .....	38
Luminex Aries ® FLU A/B & RSV Bench .....	40
Luminex Aries ® SARS-CoV-2 PCR Testing.....	42
Blood Culture Processing Bench .....	45
Infection Control.....	47
Genital Specimens .....	49
IMS – Inventory Management System Training .....	51
Miscellaneous Planting Bench.....	52
Send-out Specimens.....	54
Outstanding List Review.....	56
Urine Planting Bench.....	57
Respiratory Planting Bench .....	59
Serology Accessioning Bench .....	61
Virology Accessioning Bench .....	63

UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 2 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

Seegene ALLPLEX 2019 nCoV Assay .....	65
MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2 .....	67
SIBO .....	70
COVID Receptionist.....	72
COVID ACCESSIONING BENCH.....	74
COVID ALIQUOTING BENCH .....	76
<b>BACTERIOLOGY TRAINING .....</b>	<b>78</b>
Vitek Bench .....	78
WASPLAB Bench .....	81
TREK Sensititre System .....	83
Maldi-Vitek MS .....	85
Respiratory Bench.....	88
Urine Bench .....	90
Miscellaneous/Wound Bench .....	92
Gynae & Enterics Bench.....	94
STAT Bench .....	96
Blood Culture Bench.....	97
Infection Control - MRSA .....	100
Infection Control Bench - VRE .....	102
Infection Control Bench - CRE /ESBL.....	104
GeneXpert Training (please circle) - VRE / C.difficile / CRE / Enterovirus .....	106
Quality Control Bench .....	108
PFGE Bench.....	110
<b>SEROLOGY &amp; VIROLOGY TRAINING.....</b>	<b>113</b>
Virology Accessioning Bench .....	113
Alinity Bench .....	115
AltoStar .....	119
Architect Bench .....	121
ARIES® C. difficile Testing.....	124
ARIES® HSV/VZ Testing .....	124
ARIES® SARS-CoV-2 PCR Testing.....	124
Biorad CFX96 Deep Well ThermoCycler .....	125
BioFire FilmArray Encephalitis Panel Testing.....	130
easyMAG Bench.....	132
Roche cobas® 6800 CT/NG Bench Training .....	134
Roche cobas® 6800 HPV Bench Training .....	137
cobas 6800 WNV/MPX Bench Training .....	140
Cobas 6800 CMV Bench Training .....	142
Mono / VZ Ab / CMV Immucor Tests .....	144
Luminex Aries ® FLU A/B & RSV Bench .....	146



UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology	Policy # QPEMI03001	Page 3 of 177
	Version: 3.18 CURRENT	
Quality Manual		
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

Evolis EIA Bench .....	148
Respiratory Pathogen Panel NxTAG™ RT-PCR by Luminex®.....	150
Xpert ®Xpress SARS-CoV-2 AND Xpert ®Xpress SARS-CoV-2/Flu/RSV.....	153
Seegene ALLPLEX 2019 nCoV Assay .....	156
ALTOSTAR SARSCoV 2 –COVID 19 PCR testing .....	158
MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2 .....	160
MGI STP 7000 Training Checklist .....	162
MGI STP 7000.....	162
SARS CoV-2 Variant of Concern (VOC) 501 SNP RT PCR.....	164
ABBOTT ID NOW COVID-19 .....	166
<b>MYCOLOGY TRAINING</b> .....	168
<b>Record of Edited Revisions</b> .....	172

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 4 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

## HOSPITAL ORIENTATION

Welcome to Mount Sinai Hospital!

To help new employees get started, Mount Sinai Hospital (MSH) has created a two day general hospital orientation. The orientation program has been designed to guide new employees effortlessly into becoming an integrated member of the team.

The orientation is divided into 3 sections:

- 1) Hospital Policies & Safety
- 2) Prepare for Payroll Documentation
- 3) Health Assessment

### 1) Hospital Polices and Safety



Employees will review rules on Behaviour, the Administrative Chart, Terms of Conditions of Employment as well as policies and procedures such as Harassment, Safety & Fire and Service with heart.

### 2) Prepare for Payroll Documentation

Employees will prepare documentation and register for the payroll system as well as benefit enrollment.

### 3) Health Assessment

All MSH employees, students and affiliates will have to complete a Health Review Questionnaire and submit this to Occupational Health Wellness and safety representative.

  Department of Microbiology	Policy # QPEMI03001	Page 5 of 177
	Version: 3.18 CURRENT	
Quality Manual	Subject Title: Orientation for Technologists_Technicians	
Section: Personnel		

## WELCOME TO THE UHN/MSH DEPARTMENT OF MICROBIOLOGY

As the Director of the Department of Microbiology I am pleased to welcome you to our team. This document will provide you with some information about the department and act as a guide throughout your orientation. This process will ensure that all new employees will have a fair and comprehensive orientation to the department.

I will be meeting with you at various milestones throughout your orientation to review your progress and to share any concerns or suggestions that you may have with the process.

All of the components of this program have been designed by the department's staff for you and as such represent those points considered by your peers to be the most critical for your success.

I hope that you enjoy the process and that you and the Department of Microbiology will have a long and successful journey together.

Best Wishes

Administrative Director

### **Why we're all here.....**

The UHN/ MSH Department of Microbiology is recognized as the leading academic, service and reference laboratory in the country. Our team is comprised of a diverse group of professionals dedicated to providing exemplary laboratory services to our patients, and to advancing laboratory science. In striving for this mission the team's work is guided by the values of:

- Service quality
- Academic excellence
- Innovation
- Accountability

And our culture is guided by:


- Diversity and respect for all
- Enthusiasm and life long learning
- Teamwork

UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

 Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 6 of 177
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

### How you can make your orientation experience the very best it can be...

The UHN/MSH Department of Microbiology is no ordinary operation - in fact we think we are the laboratory to work for in Canada. One of the key benefits to working here is access to leading edge laboratory practice and knowledge. Your work experience here is largely dependent on what you make it. We will supply the tools for you, but ultimately you will need to become involved in departmental activities, committees and projects to enjoy the full experience.

### Who are we?...


The Joint Department of Microbiology is a partnership of the UNIVERSITY HEALTH NETWORK and the Mount Sinai Hospital. Bacteriology Virology, Serology, Parasitology and Mycology are located on the 14<sup>th</sup> floor at Mount Sinai Hospital.

We service in excess of 5000 beds in our core hospitals and client institutions. These include: University Health Network (Toronto General, Toronto Western, Princess Margaret, Toronto Rehab - 4 locations)

Mount Sinai Hospital  
Baycrest Centre for Geriatric Care  
Bridgepoint Hospital  
Toronto Grace Hospital  
Center for Addiction and Mental Health  
Other programs include:  
Bone bank, Eye bank, TGLN program, Cord Blood Program, Milk bank program, Inception cord blood program among others.

The Department of Microbiology is comprised of a diverse group of dedicated and talented health care professionals and support staff.

Every member of the Microbiology Team is expected to contribute to a work environment that supports our mission and equally supports diversity and respect in the workplace.



 Department of Microbiology	Policy # QPEMI03001	Page 7 of 177
	Version: 3.18 CURRENT	
Quality Manual	Subject Title: Orientation for Technologists_Technicians	
Section: Personnel		

### What do we do...

The department offers a full range of services to our clients: Bacteriology, Virology, Serology, Parasitology and Mycology.

### We are part of a much larger group...

Although you will be part of the Microbiology Team, you are part of a much larger family. The other laboratories at UHN and MSH have an additional 800 staff members, 500 at UHN and 300 at MSH. As an employee of Microbiology you are fortunate, in that you will have the benefits that come with belonging to both groups. You will be presented with the opportunity to enhance your education, to experience the rewards of committee participation as well as partaking in various social events throughout the year.

  Department of Microbiology	Policy # QPEMI03001	Page 8 of 177
	Version: 3.18 CURRENT	
Quality Manual	Subject Title: Orientation for Technologists_Technicians	
Section: Personnel		

## LABORATORY TRAINING

### ORIENTATION

#### 1. **Introductions**

On arrival, the new employee will report to the Director or Manager. A formal introduction to the Director, Manager, Charge Technologists, Medical microbiologists will take place. During a departmental tour, the remaining Microbiology staff will be introduced.

#### 2. **Tour of Facilities**

The new employee will tour with the Director or Manager. They will be shown the locations of the washrooms, food refrigerators, Infection Control, cafeteria, Occupational Health and Human Resources. Rules for using public areas such as the classroom, library and staff lounge will also be discussed.

#### 3. **Meeting with Director/Manager**

The new employee will meet with the Director or Manager and discuss the following:

- Departmental orientation process
- Organizational chart
- Patient Confidentiality Policy
- Diversity and respect for others
- Who to go to for what
- Shift structure, coffee and lunch breaks
- Vacation Policy
- Attendance Management and Workplace Injuries
- Continuing education opportunities, conferences and rounds
- Orientation process and probationary period

The employee and Manager will document that they discussed the above.

#### 4. **Meeting with Safety Representative and Infection Control**

The employee will meet with the safety representative and discuss the following:

- Universal Precautions
- What to do in case of fire
- Emergency codes system
- WHMIS
- Lab coat policy/shoes



UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 9 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

The employee and safety representative will document that they have discussed the above. The documentation is to be given to the Director.

**5. Obtaining a Microbiology Laboratory Security Access Pass**

Once the employee has successfully completed the safety and infection control documentation, the laboratory manager or charge technologist will accompany the employee to Security Services to obtain their microbiology laboratory security access pass.

**6. Meeting with Charge Technologist**

The new employee will meet with a Charge Technologist and discuss the following:

- Manuals
- Telephone and Critical Values Policy
- Schedules, notice boards
- Location and use of internal forms
- Lockers, keys etc
- Departmental cultural issues (expectations around helping others, etc)
- Supplies/Ordering

The employee and Charge Technologist will document that they have discussed the above. The documentation is to be given to the Director and filed in the employee's record.

**7. Quality Management System Training**



The employee will meet with the quality systems technologist and discuss the following:

- Quality System, Quality Committee and responsibilities
- Quality manual
- Quality issue reporting structure & occurrence management
- Quality improvement process

**8. Information Systems Training**

The new employee will receive an introduction and training from a Laboratory Information System (LIS) Officer or key operator in the following:

- SCC (SoftMic, SoftLab, SoftTotalQC, SoftMedia and SoftStore modules)
- Quadramed (EPR at UHN)
- Website

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>10</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

The training will include exercises that involve strategies to deal with commonly seen problems such as correcting reports. The new employee **will not** proceed to any further training on the benches until they have demonstrated the necessary skills to the trainer.

The Director will meet with the employee at the end of the first week to review progress and answer any questions that they may have.

## 9. Set up Personnel Folder

A new personnel folder will be set up for the new employee to be kept in the Administrative Director's office. The personnel folder contains sections as follows:

### Personnel Information



- Job offer letter including start of employment date
- Copy of academic diploma
- Copy of confirming credentials
- Copy of Certification – CSLMS for technologists; OSMT for technicians
- CMLTO licence for technologists; OSMT licence for technicians

### Training Record

### Competency Testing Record

### Continuing Education Record

### Performance Appraisals Record

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>11</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

## TRAINING SCHEDULE

### SPECIMEN PLANTING AND ACCESSIONING AREA

If the employee has demonstrated the required proficiency during their orientation, they will proceed to the planting/accessioning area. The purpose of this rotation is to better familiarize the employee with the complexity of the department, and reinforce the computer skills learned in week one. Technologists will be teamed with an experienced technician until training is complete and then work independently.

The employee will meet with the senior technologist and the trainer at the end of the complete area training to review progress.

### BACTERIOLOGY AND VIROLOGY TRAINING

If the employee has satisfied the training objectives of the planting and accessioning area, they will be scheduled on a bacteriology or virology bench. The first two weeks will be in tandem with a teaching technologist, the third and fourth week will be solo. This session will also include training on the general operational procedures needed such as Vitek & Vitek MS training.

The employee will meet with senior technologist and the trainer at the end of the four weeks to review progress. The employee will not move to the next bench until they have proven their competency in this area.

Six months after successful completion of training in each area, competency will be assessed using the [Six Months Post Training Competency Assessment Form QPEMI05005b](#). To continue working in an area, the employee must display continued competency. If competency is not displayed, work in the tested area will be halted until re-training can occur.

### PROBATIONARY PERIOD REVIEW



The employee's performance will be reviewed after the preliminary fifteen-week rotation. If the employee is successful in achieving the training objectives and can demonstrate an acceptable level of proficiency, the Director will issue a letter confirming this. If the employee has failed to meet the objectives or unable to demonstrate the required proficiency, the Director will meet with the employee and either extend the probationary period or terminate the employee.

If the employee has passed the probation period they will then proceed through their full training.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 12 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Manager Name:** \_\_\_\_\_

*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Manager Initials	Date (yyyy-mm-dd)
<b>DEPARTMENT STRUCTURE &amp; CULTURE - MANAGER</b>					
1.1	Employee understands the structure of the Joint Department (organizational chart, committees and responsibilities)				
1.2	Is familiar with the departmental orientation process and probationary period				
1.3	Is familiar with the shift structure and expectations around coffee and lunch breaks				
1.4	Is familiar with the vacation policy				
1.5	Is familiar with the hospital's attendance management program				
1.6	Is familiar with security issues and the name tag policy				
1.7	Is aware of the policy concerning diversity and respect for others				
1.8	Is aware of the policy concerning continuing education, conferences and rounds				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

*Signature*

*Date (yyyy-mm-dd)*

**Manager**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



*Signature*

*Date (yyyy-mm-dd)*

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 13 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

Employee Name: \_\_\_\_\_  
*Print Name*

Charge Technologist Name: \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Charge Technologist Initials	Date (yyyy-mm-dd)
<b>DEPARTMENTAL ISSUES-CHARGE TECHNOLOGIST</b>					
1.1	Employee understands format of manuals and where they are located				
1.2	Telephone Policy and etiquette has been explained				
1.3	Employee is aware of the critical values policy				
1.4	Employee has been given a locker and security pass				
1.5	Employee has been shown the location of notice boards and work schedules				
1.6	Departmental cultural issues i.e., expectations around helping others, reporting to Charge Technologist if scheduled as a float.				
1.7	Payroll Issues				
1.8	Supplies				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



**Charge Technologist**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology	Policy # QPEMI03001	Page 14 of 177
	Version: 3.18 CURRENT	
Quality Manual	Subject Title: Orientation for Technologists_Technicians	
Section: Personnel		

**DEPARTMENTAL SAFETY ISSUES - SAFETY TECHNOLOGIST / INFECTION CONTROL PRACTITIONER**

Refer to the Orientation Checklist in the Laboratory Safety Manual:  
[Orientation\\_Safety\\_Checklist](#)

For Non- Laboratory Personnel, See: [Microbiology Laboratory Safety Awareness for Non-Laboratory Personnel](#)

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 15 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

Employee Name: \_\_\_\_\_  
*Print Name*



Safety Officer Name: \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Safety Officer / ICP / Charge Technologist / Microbiologist Initials	Date (yyyy-mm-dd)
<b>Handling and Processing of Specimens from Patients with Suspected or Documented Viral Hemorrhagic Fever Training Checklist</b>					
1.1	Employee has read the Procedure for Handling and Processing of Specimens from Patients with Suspected or Documented Viral Hemorrhagic Fever (VHF)				
1.2	Employee has met with Safety officer regarding safe handling of highly infectious materials				
1.3	Employee has reviewed the contents of the VHF kits				
1.4	Employee has reviewed and practiced donning of PPE as per SOP				
1.5	Employee has reviewed the preparation of the work area for processing specimens				
1.6	Employee has reviewed the preparation of the work area for processing of blood cultures				
1.7	Employee has reviewed and practiced doffing of PPE as per SOP				
1.8	Employee has reviewed and practiced clean-up of work area as per SOP				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 16 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	


**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



 Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 17 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	QA Tech Initials	Date (yyyy-mm-dd)
<b>QUALITY MANAGEMENT SYSTEM TRAINING</b>					
1.1	Employee understands the structure of the Departmental Quality System (quality issues reporting structure, committees and responsibilities)				
1.2	Employee is familiar with the departmental quality manual.				
1.3	Employee is familiar with the quality essentials as applied to the department				
1.4	Employee is familiar with the departmental occurrence management structure.				
1.5	Employee is familiar with the quality improvement process				
Employee Feedback					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 18 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>INFORMATION SYSTEMS TRAINING</b>					
1.1	Review the LIS manual and Soft Computer Company (SCC) manuals with the trainer				
1.2	Review of security policies for all information systems and security access provided to the network, LIS and UHN HIS				
1.3	Overview of HIS systems/clients including integration with LIS through interfaces				
1.4	Introduction to Meditech and Cerner Hospital Information System (HIS) systems				
1.5	Introduction and training on UHN HIS				
1.6	Introduction and training on SoftComm				
1.7	Introduction and preliminary training on SoftMic and SoftLab				
1.8	Introduction and preliminary training on SoftTotalQC				
1.9	Introduction and preliminary training on SoftStore				
1.10	Introduction to the Microbiology website and on-line manual				
1.11	Review of downtime policies				
1.12	Label and report printer training				
1.13	Introduction to LIS support policies				
Employee Feedback					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>19</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 20 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>CHARGE TECHNOLOGIST TRAINING</b>					
1.1	Able to use LIS and outlook email to communicate with staff. Communicate effectively with management. Communicate effectively with staff on all shifts.				
1.2	Communicate effectively by telephone or by email with all clients, stock holders, other departments and vendors				
1.3	Familiar with duties at all staff levels				
1.4	Understand staffing requirements in each area				
1.5	Familiar with staff scheduling and staff scheduling files				
1.6	Complete Dayforce training by the hospital				
1.7	Able to enter staff scheduling changes with Dayforce enteries				
1.8	Complete LIS training for SoftLab, SoftMic, SoftTotalQC to be able to validate reports and QC entries				
1.9	Understands the concepts of a Quality Management systems <ul style="list-style-type: none"> <li>• Familiar with the Quality manual and 12 Quality System Elements</li> </ul>				
1.10	Is aware of the licences held by the department of microbiology procedures to maintain the licenses <ul style="list-style-type: none"> <li>• HPTA</li> <li>• MOH Laboratory License</li> <li>• Ontario Laboratory Accreditation</li> </ul>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 21 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>CHARGE TECHNOLOGIST TRAINING</b>					
	<ul style="list-style-type: none"> <li>• ISO 15189 Plus</li> <li>• CAP</li> </ul>				
1.11	Aware of proficiency testing process: Order, log, review and enter proficiency testing samples.				
1.12	Familiar with validation and verification of new methods implementation				
1.13	Aware of document control <ul style="list-style-type: none"> <li>• Creating and editing documents</li> <li>• Manual distribution and staff review procedure</li> <li>• Notification procedure to clients</li> <li>• Record maintenance, archival, retrieval process</li> </ul>				
1.14	Familiar with Bench Procedural Manuals				
1.15	Familiar with reference resources available: <ul style="list-style-type: none"> <li>• Manual of Clinical Microbiology</li> <li>• CLSI documents</li> <li>• Cumitechs</li> <li>• USP Compounding Guidebook</li> <li>• Good Manufacturing Practice (GMP) guidelines</li> </ul>				
1.16	Familiar with and understands the GMP guidelines and its concepts.				
1.17	Use incidents, indicators, suggestions as tools for process improvement.				
1.18	Understand Risk Management as a process improvement technique for new and updated procedures.				
1.19	Aware of Charge Tech's				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 22 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>CHARGE TECHNOLOGIST TRAINING</b>					
	responsibility for equipment requirements: <ul style="list-style-type: none"> <li>• Equipment log</li> <li>• PM and maintenance records</li> <li>• Receiving/Moving/ Disposal checklists</li> <li>• Validation procedures</li> <li>• Troubleshooting procedures</li> </ul>				
1.20	Understands the personnel training process and the competency testing process				
1.21	Familiar with inventory requirements <ul style="list-style-type: none"> <li>• Inventory system</li> <li>• Receiving/inspection process</li> <li>• Vendor selection and assessment</li> </ul>				
1.22	Understand the facility and safety requirement in the microbiology laboratory: <ul style="list-style-type: none"> <li>• HPTA (facility access / pathogen management)</li> <li>• Transportation of dangerous goods</li> </ul> Familiar with safety manual, safety training schedule (fire/WHMIS/mask fitting) Familiar with the safety inspection frequency.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>23</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 24 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>QUALITY ASSURANCE TECHNOLOGIST TRAINING</b>					
1.1	Understands the concepts of a Quality Management systems <ul style="list-style-type: none"> <li>Familiar with the Quality manual and 12 Quality System Elements</li> </ul>				
1.2	Is aware of the licences held by the department of microbiology procedures to maintain the licenses <ul style="list-style-type: none"> <li>HPTA</li> <li>MOH Laboratory License</li> <li>Ontario Laboratory Accreditation</li> <li>ISO 15189 Plus</li> <li>CAP</li> </ul>				
1.3	Familiar with validation, verification and QC requirements				
1.4	Aware of proficiency testing process: <ul style="list-style-type: none"> <li>order, log, review and enter proficiency testing samples.</li> </ul>				
1.5	Able to use MICQC to verify QC performed Able to verify and finalize reports.				
1.6	Familiar with reference resources available: <ul style="list-style-type: none"> <li>Manual of Clinical Microbiology</li> <li>CLSI documents</li> <li>Cumitechs</li> <li>USP Compounding Guidebook</li> <li>Good Manufacturing Practice (GMP) guidelines</li> </ul>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\





  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 25 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>QUALITY ASSURANCE TECHNOLOGIST TRAINING</b>					
1.7	Familiar with and understands the GMP guidelines and its concepts.				
1.8	Uses incidents, indicators, suggestions as tools for process improvement.				
1.9	Understand Risk Management as a process improvement technique for new and updated procedures.				
1.10	Familiar with document control <ul style="list-style-type: none"> <li>• Creating and editing documents</li> <li>• Manual distribution and staff review procedure</li> <li>• Notification procedure to clients</li> <li>• Record maintenance, archival, retrieval process</li> </ul>				
1.11	Aware of equipment requirements: <ul style="list-style-type: none"> <li>• Equipment log</li> <li>• PM and maintenance records</li> <li>• Receiving/Moving/Disposal checklists</li> <li>• Validation procedures</li> <li>• Troubleshooting procedures</li> </ul>				
1.12	Understands the personnel training process and the competency testing process				
1.13	Familiar with inventory requirements <ul style="list-style-type: none"> <li>• Inventory system</li> <li>• Receiving/inspection process</li> <li>• Vendor selection and assessment</li> </ul>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 26 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>QUALITY ASSURANCE TECHNOLOGIST TRAINING</b>					
1.14	Aware of the occurrence management process including: <ul style="list-style-type: none"> <li>• Classification of incidences</li> <li>• Corrective action procedure</li> <li>• Incident reports including investigation, corrective action, evaluation of effectiveness</li> <li>• Classification, monitoring, trending</li> </ul>				
1.15	Familiar with internal and external assessment process				
1.16	Understanding of the LIS system including creating epidemiology reports.				
1.17	Understand the facility and safety requirement in the microbiology laboratory: <ul style="list-style-type: none"> <li>• HPTA (facility access / pathogen management)</li> <li>• Transportation of dangerous goods</li> </ul> Familiar with safety manual, safety training schedule (fire/whmis/mask fitting) Familiar with the safety inspection frequency.				
1.18	Familiar with the client and staff input procedures.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 27 of 177
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**



I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 28 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>PARADIGM DOCUMENT CONTROL SYSTEM – General User</b>					
1.1	Trainee is able to log into the software and launch paradigm or action items.				
1.2	Trainee can locate and switch between different modules.				
1.3	Trainee can locate the main table of contents document and understands the main folder structures.				
1.4	Trainee is able to search for a document by using name, label and original ID.				
1.5	Trainee is able to <ul style="list-style-type: none"> <li>• View</li> <li>• Export</li> <li>• Email</li> <li>• Print</li> </ul> Documents as required.				
1.6	Trainee is able to view and complete current action items.				
Employee Feedback:					



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>29</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
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**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 30 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>PARADIGM DOCUMENT CONTROL SYSTEM – Expert User</b>					
1.1	Trainee has reviewed and understands the Manual Creation Revision Procedure QDRMI03002				
1.2	Trainee is able change the status of a document to draft, ready or current.				
1.3	Trainee is able to check –in and check – out documents to the T-drive properly.				
1.4	Trainee is aware of limitations when editing document as it applies to file name, margins, headers and footers.				
1.5	Trainee can create and send one time action items.				
1.6	Trainee can set up events and action items as required.				
1.7	Trainee can publish a document to the external microbiology website.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>31</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
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**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 32 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>SENIOR TECHNOLOGIST TRAINING</b>					
1.1	Able to use LIS and outlook email to communicate with staff. Communicates effectively with management. Communicate effectively with staff on all shifts.				
1.2	Communicates effectively by telephone or by email with all clients. Uses microbiology special queries to address client needs, out of range temperature notifications, manual change requests.				
1.3	Uses SoftTotalQC to ensure QC has been entered, and verified if warranted				
1.4	Use the LIS worklists to verify reports accurately and check pending lists.				
1.5	Ensure manuals are up to date, submits any revisions, performs annual review of procedures.				
1.6	Familiar with the inventory procedure, assessing order quantity with min and max provided. Plexxus and eREQ ordering.				
1.7	Able to use QCOM as well incident report form to document and follow up with reported incidences.				
1.8	Aware of procedure and organizing bench staff - when personnel call in sick. - provide training checklist to personnel learning a new bench				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>33</b> of <b>177</b>
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>SENIOR TECHNOLOGIST TRAINING</b>					
1.9	Attends and organizes meetings with management as needed. Aware of how to add minutes to staff or other meetings as appropriate. Problem solves with the charge, manager, microbiologist as needed.				
2.0	Tracks all proficiency testing samples ensuring their arrival, proper and accurate testing, resulting and submitting on time.				
2.1	Communicates guides, answers questions, and troubleshoots with bench staff.				
Employee Feedback:					



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.  
*Signature* *Date (yyyy-mm-dd)*

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.  
*Signature* *Date (yyyy-mm-dd)*

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 Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 34 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

### PLANTING & ACCESSIONING TRAINING

Employee Name: \_\_\_\_\_  
*Print Name*



Trainer Name: \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>General Accessioning</b>					
1.1	Reviewed the manual with the trainer				
1.2	Validates information according to requisition, specimen and accepts/rejects specimen based on Specimen Acceptance Policy				
1.3	Accessions specimen using manual and computerized methods as appropriate				
1.4	Understands how to order entry using Soft and UHN HIS system				
1.5	Understand how to order entry for different specimens for different hospitals: <ul style="list-style-type: none"> <li>• UHN (TGH, TWD &amp; PMH &amp; TRI)</li> <li>• Toronto Grace Hospital</li> <li>• Bridgepoint Hospital</li> <li>• MSH</li> <li>• Baycrest Hospital</li> <li>• CAMH</li> <li>• Referred-in specimens</li> <li>• Study specimens</li> </ul>				
1.6	Determines processing requirements during downtime				
1.7	Know where to pick up specimens from MSH 6 <sup>th</sup> floor when required				
1.8	Understand how to sort specimens				
1.9	Knowledge of appropriate media for different types of specimens				
1.10	Know which specimens to send out to the appropriate location				
1.11	Trainee can use the Translogic safely				
1.12	Understands laboratory access				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 35 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>General Accessioning</b>					
	procedure				
1.13	Understands how to review pending lists				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 36 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



**The following items apply to both technicians and technologists**

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>ARIES® C. difficile Testing</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure in the Microbiology Manual.				
1.3	Employee is familiar with the use of proper specimen type and storage.				
1.4	Employee is able to collect the appropriate stool specimen using the provided ARIES® Stool Resuspension Swab, according to the specimen's consistency.				
1.5	Employee is able to avoid disturbing the beads in the ARIES® Stool Resuspension Tube or during transfer of the beads to the cassette.				
1.6	Employee visually inspects the cassette for any damage after it is removed from its packaging prior to adding sample				
1.7	Employee always checks that sample has been added to the cassette before loading into the magazine and is aware that an empty cassette will give false negative result.				
1.8	Employee is familiar with loading cassette into the instrument, unloading from the instrument and proper disposal of the waste.				
1.9	Employee is familiar with the procedures required when a PCR tube falls off the cassette or a cassette leaks inside the ARIES® instrument				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 37 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>ARIES® C. difficile Testing</b>					
2.0	Employee is familiar with repeating test for invalid result				
2.1	Employee has successfully run samples				
Employee Feedback:					

**The following items apply to technologists only**

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date
<b>ARIES® C. difficile Testing</b>					
2.1	Trainee has reviewed and understand the different possible combination of results: <b>Negative, Positive and Invalid</b>				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 38 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



**The following items apply to both technicians and technologists**

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>ARIES® HSV and VZV Testing by Luminex</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure in the Microbiology Manual.				
1.3	Employee is familiar with the use of proper specimen type and storage.				
1.4	Employee visually inspects the cassette for any damage after it is removed from its packaging prior to adding sample				
1.5	Employee hears a click when cassette is snapped onto Ready Mix tube				
1.6	Employee always make sure to peeled off the foil and attached plastic before loading the cassette				
1.7	Employee always checks that sample has been added to the cassette before loading into the magazine and is aware that an empty cassette will give false negative result.				
1.8	Employee is familiar with loading cassette into the instrument, unloading from the instrument and proper disposal of the waste.				
1.9	Employee is familiar with the procedures required when a PCR tube falls off the cassette or a cassette leaks inside the ARIES® instrument				
2.0	Employee always do post inspection for side-cassette and PCR tube before discarding after the test is done				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>39</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>ARIES® HSV and VZV Testing by Luminex</b>					
2.1	Employee is familiar with repeating test for invalid result				
2.2	Employee has successfully run samples				
Employee Feedback:					

**The following items apply to technologists only**

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
2.3	Trainee has reviewed and understand the different possible combination of results: <b>Negative, Positive and Invalid</b>				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 40 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Luminex Aries ® FLU A/B &amp; RSV Bench</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed relevant sections of the SOP in the Live Manual > Molecular Diagnostic Test Manual> Influenza A, B & RSV PCR by Luminex Aries.				
1.3	Trainee is aware of the Ct cut-off values for Flu A, B and RSV and interprets the results accordingly.				
1.4	Trainee has reviewed : <ul style="list-style-type: none"> <li>• Accessioning and ordering Aries Influenza A, B &amp; RSV for NP and BAL samples.</li> </ul>				
1.5	Trainee is familiar with documentation in LIS of the BSC maintenance and bench clean-up.				
1.6	Trainee has reviewed the daily maintenance and clean-up requirements for the Aries and where to document this.				
1.7	Trainee has reviewed the Weekly maintenance.				
1.8	Trainee is familiar with the use of the Luminex Aries ® Assay System				
1.9	Trainee is familiar with pushing the magazine into the module properly when loading. Once pushed in, the switch is activated and the analyzer initiates automatically, the magazine cannot be pulled out until the testing is completed.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>41</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Luminex Aries ® FLU A/B &amp; RSV Bench</b>					
2.0	Trainee is familiar with the proper storage and handling and disposal of sample cassettes.				
2.1	Trainee has reviewed the testing of External controls as detailed in the Manual on each new shipment and lot.				
2.2	Trainee is familiar with documenting the in-use of a new kit in the excel spreadsheet.				
2.3	Employee always do post inspection for side-cassette and PCR tube before discarding after the test is done				
2.4	Trainee is familiar with repeat testing of invalid results				
2.5	Trainee is has successfully completed set up and data analysis of given samples and/or controls				
2.6	Trainee is familiar with limitation of the assay (Failure to add sample will produce FALSE NEGATIVE result )				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_ , on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

*Signature* *Date (yyyy-mm-dd)*

**Trainer**



I, \_\_\_\_\_ , on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

*Signature* *Date (yyyy-mm-dd)*

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 42 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Luminex Aries ® SARS-CoV-2 PCR Testing</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure in the Microbiology manual.				
1.3	Employee is familiar with the use of proper specimen type and storage.				
1.4	Trainee is familiar with use of BSC and aseptic/sterile techniques				
1.5	Trainee has reviewed the maintenance and clean-up requirements for the Aries and where to document this.				
1.6	Trainee is familiar with the use of the Luminex Aries ® Assay System and assays <ul style="list-style-type: none"> <li>- SARS-CoV-2</li> <li>- Extraction Kit with EXO kit</li> <li>- Use of cRNA with either kit.</li> </ul>				
1.7	Employee is familiar with loading cassettes: <ul style="list-style-type: none"> <li>- Creation of worklist and notification process to Technologists</li> <li>- Visually inspect the cassette for any damage after it is removed from packaging prior to adding sample.</li> <li>- Remove foil completely</li> <li>- Visually check sample is added (prevent false negatives)</li> <li>- Name run files without special characters or spaces following</li> </ul>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 43 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Luminex Aries ® SARS-CoV-2 PCR Testing</b>					
	standard format  - <b>Push the magazine into the module properly. Once pushed in, the switch of the module is activated and the analyzer initiates automatically, the magazine cannot be pulled out until the testing is completed.</b>				
1.8	Employee is aware of post testing processes: - Troubleshooting cassette leakage or stuck tube - Post inspection of side-cassette and PCR tube prior to discard - Proper discard of cassettes (closed and in a bag before put in biohazard waste) - Proper cleaning of area.				
Employee Feedback:					



**The following items apply to technologists only**

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
2.3	Trainee has reviewed and understand the different possible combination of results: <b>Negative, Positive and Invalid</b>				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 44 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 45 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_


**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Blood Culture Processing Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with blood culture bottle types and media				
	Employee is familiar loading BC bottles onto the virtuo.				
1.3	Employee is familiar with Isolator 10 procedure				
1.4	Employee is familiar with the processing procedure for blood culture bottles. <ul style="list-style-type: none"> <li>• Changing incubation times</li> </ul>				
1.5	Employee is familiar with accessioning non-blood fluids & proper label on bottle				
1.6	Employee is familiar with the daily operations of the Virtuo including maintenance and troubleshooting barcode errors				
1.7	Employee is familiar with the proper procedure for processing specimen off-line				
1.8	Employee understands the STAT nature of positive blood cultures and priority over other duties.				
1.9	Employee is familiar with processing positive bottles STAT				
1.10	Employee is familiar with positive subculture procedure of FO2 and PED bottles on the WASP and alternate procedure.				
1.11	Employee is familiar with positive subculture of FN positive bottles				
1.12	Employee is familiar offline incubation				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

 Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 46 of 177
		Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Blood Culture Processing Bench</b>					
	of blood culture bottles.				
1.11	Employee is familiar with reloading false positive bottles.				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 47 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Infection Control</b>					
1.1	Knowledge of specimen collection, transportation and proper containers				
1.2	Employee has read the specimen processing .				
1.3	Knowledge of appropriate media for specimens.				
1.4	Knowledge of processing and planting specimens procedures and the use of sterile techniques.				
1.5	Knowledge of condition for incubating primary isolation media				
1.6	Understands and able to use different instrumentation to process specimen, perform maintenance required and troubleshoot.				
1.7	Employee is aware of QC to be set up and documentation of QC.				
1.8	Storage of specimens before and after processing and is aware of Retention Time Policies				
1.9	Familiar with the proper daily disinfection of the work area including PCR areas.				
1.10	Knowledge of specimen rejection for IC samples				
1.11	Understand STAT natures of PCR tests and priority of specimens.				
1.12	Aware of duties and workflow				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>48</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>49</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Genital Specimens</b>					
1.1	Knowledge of specimen collection, transportation and proper containers				
1.2	Employee has read the specimen processing .				
1.3	Knowledge of appropriate media for specimens.				
1.4	Knowledge of processing and planting specimens procedures .				
1.5	Knowledge of condition for incubating primary isolation media				
1.6	Understands and able to use different instrumentation to process specimen, perform maintenance required and troubleshoot.				
1.7	Employee is aware of QC to be set up and documentation of QC.				
1.8	Storage of specimens before and after processing and is aware of Retention Time Policies				
1.9	Familiar with the proper daily disinfection.				
1.10	Knowledge of specimen rejection for genital specimens				
1.11	Understand duties, workflow and priority of specimens				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 50 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>51</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>IMS – Inventory Management System Training</b>					
1.1	Employee has reviewed and is familiar with the IMS manual.				
1.2	Employee can successfully create, print and receive RFID tags for all Non-Abbott products in IMS.				
1.3	Employee is able to receive Abbott products using AlinIQ Handheld Device				
1.4	Employee can successfully perform product consumption using AlinIQ Handheld Device.				
1.5	Employee is competent in expired product procedure including <ul style="list-style-type: none"> <li>• printing expired product list from IMS</li> <li>• remove expired products from stock and consuming as “expired” by hand held device.</li> </ul>				
Employee Feedback:					

**Employee**



I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 52 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*


**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Miscellaneous Planting Bench</b>					
1.1	Knowledge of specimen collection, transportation and proper containers				
1.2	Knowledge of preparation and staining of different kinds of smears e.g. grams, ZN, modified Kinyoun stain and Fungal stain.				
1.3	Knowledge of appropriate media for different types of specimen (media types, composition, purpose advantages and disadvantage)				
1.4	Knowledge of processing and planting different types of specimens i.e. swabs, fluids, pus, tissues, bone marrow, biopsies, nails, skin scrapings, etc.)				
1.5	Knowledge of condition for incubating primary isolation media				
1.6	Knows how to process specimens using Isoplater and Gram Stain Instrument				
1.7	Employee is aware of QC to be set up and documentation of QC.				
1.8	Knowledge of maintenance and troubleshooting of equipment and instruments.				
1.9	Storage of specimens before and after processing and is aware of Retention Time Policies				
1.10	Familiar with the proper daily disinfection of the work area				
1.11	Familiar with Workflow and duties				
2.1	Technician is familiar with Vitek2 instrument and interface.				
2.2	Technician is aware of Vitek2 status and menu options.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

 Department of Microbiology Quality Manual	Policy # QPEMI03001 Version: 3.18 CURRENT	Page 53 of 177
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

2.3	Technician is able to perform Monthly Maintenance on Vitek2 i.e. Boat, Carousal and Optic Cleaning.				
2.4	Technician is able perform diagnostic test for Optics after cleaning.				
2.5	Technician is able perform Shutdown and Reset after cleaning.				
2.6	Technician is able Perform Monthly Densicheck Cleaning.				
2.7	Technician is aware of Total Qc documentation after monthly maintenance.				

Employee Feedback:

**Employee**



I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

*Signature*    *Date (yyyy-mm-dd)*

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

*Signature*    *Date (yyyy-mm-dd)*

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 54 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

Employee Name: \_\_\_\_\_



Trainer Name: \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Send-out Specimens</b>					
1.1	Employee is familiar with sending specimens for Mycobacteria testing to the Public Health Lab as outlined in the manual				
1.2	Employee is familiar with sending specimens for Parasitology testing to the Public Health Lab as outlined in the manual				
1.3	Employee is familiar with sending specimens for Legionella, Mycoplasma, Chlamydia culture testing to the Public Health Lab as outlined in the manual				
1.4	Employee is familiar with sending specimens for antigen testing to MIRA VISTA Diagnostics as outlined in the manual				
1.5	Employee is familiar with sending specimens for slit skin smear for Leprosy to National Hansen's Disease Programs as outline in the manual				
1.6	Employee is familiar with routine send out procedures.				
1.7	Employee is familiar with packaging and transportation of specimen requirements				
1.8	Understands how to review pending lists				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 55 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 56 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Outstanding List Review</b>					
1.1	Employee is familiar with daily printing, checking, resulting and documentation of Outstanding Receiving Worklist for Bacteriology and Infection Control.				
1.2	Employee is familiar with daily printing of Plating Worklist and resolve outstanding unplated orders.				
1.3	Employee is familiar with daily checking of Baycrest Receiving Worklist and identifies outstanding orders against manifest lists.				
Employee Feedback:					



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 57 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_


**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Urine Planting Bench</b>					
1.1	Knowledge of specimen collection, transportation and proper containers				
1.2	Evaluates the suitability of specimens and acts in accordance with policy (not sufficient quantity, leaking specimen, unlabelled specimen, wrong container etc.)				
1.3	Knowledge of preparation and staining of different kinds of smears e.g. Eosinophil				
1.4	Knowledge of appropriate media for different types of specimen				
1.5	Knowledge of processing and planting different types of specimens (Segmented, nephrostomy)				
1.6	Knowledge of condition for incubating primary isolation media				
1.7	Knows how to process specimens using cytospin, centrifuges, WASP, Isoplater and Gram Stain Instrument				
1.8	Is aware of QC responsibilities and documentation				
1.9	Knowledge of operating the Cytospin				
1.10	Knowledge of maintenance and troubleshooting WASP, Isoplater and Gram Stain Instrument				
1.11	Knowledge of what media to stock up				
1.12	Storage of specimens before and after processing and is aware of Retention Time Policies				
1.13	Familiar with the proper daily disinfection of the work area				
1.14	Familiar with Workflow, duties and priority of specimens.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

 Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>58</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Urine Planting Bench</b>					
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>59</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Respiratory Planting Bench</b>					
1.1	Knowledge of specimen collection, transportation and proper containers				
1.2	Evaluates the suitability of specimens and acts in accordance with policy (not sufficient quantity, leaking specimen, unlabelled specimen, wrong container and when to pool etc.)				
1.3	Knowledge of preparation and staining of different kinds of smears e.g. gram, Eosinophil, ZN, Fungal				
1.4	Knowledge of appropriate media for different types of specimen i.e. media types, composition, and purpose				
1.5	Knowledge of processing and planting different types of specimens i.e. urine, sputum, BAL, bronchial brushes, etc.				
1.6	Knowledge of condition for incubating primary isolation media				
1.7	Knows how to process specimens using cytospin, centrifuges, grinders, stomacher, WASP, Isoplater and Gram Stain Instrument				
1.8	Employee is aware of QC to be set up and documentation of QC.				
1.09	Knowledge of operating the Cytospin				
1.10	Knowledge of maintenance and troubleshooting WASP, Isoplater and Gram Stain Instrument				
1.11	Knowledge of what media to stock up				
1.12	Storage of specimens before and after processing and is aware of Retention Time Policies				
1.13	Familiar with the proper daily disinfection of the work area				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>60</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Respiratory Planting Bench</b>					
1.14	Understands duties, workflow and priority of specimens.				
Employee Feedback:					

**Employee**

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**Trainer**

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>61</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Serology Accessioning Bench</b>					
1.1	Knowledge of specimen collection, transportation and proper containers for serology and molecular tests.				
1.2	Validates information according to requisition, specimen and accepts/rejects specimen based on Specimen Acceptance Policy.				
1.3	Ability to identify different requisitions and file away appropriately.				
1.4	Understands how to order entry using Soft, EPR or paper requisitions from different clinics and referred in samples and how to file requisitions properly.				
1.5	Identifies sample priorities based on STAT status, temperature dependency or need to be separated as soon as possible.				
1.6	Able to accession and sort routine serology samples, separate aliquots when needed and place them in appropriate testing racks				
1.7	Uses proper safety measures when accessioning and preparing samples. Accurate and careful aliquoting skills.				
1.8	Knowledge and use of safe and aseptic techniques				
1.9	Knowledge of processing <ul style="list-style-type: none"> <li>• STAT samples (needlestick/caseroom)</li> <li>• Study samples</li> <li>• Hepatitis B/C Viral load</li> <li>• HIV Viral load</li> <li>• Donors (cadaveric and live)</li> <li>• TGLN</li> </ul>				
1.10	Knowledge of preparing and sending out				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>62</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Serology Accessioning Bench</b>					
	samples to PHL and other locations.				
1.11	Understands how to enter and log QC results. (Hood, Bench, Temperatures)				
1.12	Familiar with Study protocols				
Employee Feedback:					

**Employee**

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**Trainer**

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 63 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

Employee Name: \_\_\_\_\_

Trainer Name: \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Virology Accessioning Bench</b>					
1.1	Technician is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Technician has reviewed the SOP				
1.3	Technician is familiar with the performing daily maintenance and the recording of daily maintenance for the Simplexa 3M Cyler.				
1.4	Technician has reviewed with trainer “good PCR practices” <ul style="list-style-type: none"> <li>• Prepare working Hypochloride daily</li> <li>• Clean work surface frequently throughout the day with Working Hypochloride</li> <li>• Change gloves frequently</li> <li>• Only <u>one sample should be open</u> &amp; in process at a time.</li> <li>• Clean Work surfaces, and Pipettes at end of shift</li> </ul>				
1.5	Technician has reviewed and practiced the loading of samples for Simplexa Flu A/B & RSV into the 3M Cyler.				
1.6	Technician has reviewed, and practiced the procedure with trainer for Respiratory PHL send outs: respiratory samples for Respiratory Multiplex Testing and Flu A Subtyping to PHL.				
1.7	Technician has reviewed : Accessioning, and aliquoting of EDTA specimens for EBV PCR, CMV PCR				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\





  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>65</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Seegene ALLPLEX 2019 nCoV Assay</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: - Seegene ALLPLEX 2019 nCoV Assay				
1.3	Trainee is aware of the general precautions related to PCR procedures including: a. The proper use of gloves, gowns, filtered pipette tips and the danger of ribonuclease contamination. b. The specific storage and working temperatures for reagents.				
1.4	Trainee aware of preparation of Lysis buffers and reagents for different STARMag 96x4 Cartridge kits - Universal - A kit - C kit - L kit				
1.5	Trainee is familiar with the HAMILTON Microlab Star and Biorad Thermocycler				
1.6	Trainee is aware of plate format and making checklists ensuring samples are scanned according to position.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 66 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Seegene ALLPLEX 2019 nCoV Assay</b>					
1.7	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: <ul style="list-style-type: none"> <li>a) Loading reagents consumables and waste basket into Hamilton Microlab Star</li> <li>b) Operating Hamilton Microlab Star</li> <li>c) Operating the Biorad Thermocycler.</li> <li>d) Performing Daily and Weekly maintenance on the MagPix</li> <li>e) Loading the run on the Biorad Thermocycler</li> <li>f) Post clean performed after every run</li> </ul>				
1.8	Trainee is aware that all racks are on the inner deck whenever the racks are not in use. This procedure is to prevent the racks from being damaged.				
Employee Feedback:					

**Employee**

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**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 67 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; PPE; disinfection and waste disposal.				
1.2	Trainee has reviewed and is familiar with the procedure manual.				
1.3	Trainee is aware of the general precautions related to PCR procedures including: c. The proper use of gloves, gowns and PPE, filtered pipette tips and the danger of ribonuclease contamination. d. The specific storage and working temperatures for reagents.				
1.4	Trainee is familiar with proper aseptic techniques and cleaning procedures to maintain a clean and sterile working area (Inclusive of importance of pre and post cleaning) to prevent contamination.				
1.5	Trainee is familiar with creation and checking of worklists: - Plate format - Scan one at a time - Double checking - Time stamping - Worklist / file name formats				
1.6	Trainee is familiar with heat inactivation requirements for samples.				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>68</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2</b>					
1.6	Trainee is familiar with the MGI SP 960 and Biorad Thermocycler and associated programs.				
1.7	Trainee is familiar with reagent preparation (lysis buffers, controls, master mix)				
1.8	Trainee ensures proper stocking of consumables for equipment.				
1.7	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: <ul style="list-style-type: none"> <li>g) Loading reagents, consumables and tips into MGI SP 960</li> <li>h) Operating MGI SP 960</li> <li>i) Operating the Biorad Thermocycler.</li> <li>j) Loading the run on the Biorad Thermocycler</li> <li>k) Importing the run into the Biorad Thermocycler.</li> </ul>				
Employee Feedback:					



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>69</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 70 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

Employee Name: \_\_\_\_\_



Trainer Name: \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>SIBO</b>					
1.1	The employee can successfully organize samples in numerical/collection date and accession orders in LIS <i>Observe the employee in order entry, documenting the time &amp; date received while ensuring proper organization of tubes in numerical order and storing at room temperature prior to testing.</i>				
1.2	The employee can successfully transcribe data in SIBO result form. <i>Check employee accurately enters data while documenting in duplicate to sheet assessed.</i>				
1.3	The employee can successfully perform Calibration and run QC of Quintron Breath Tracker & Quintron AlveoVac extraction unit. <i>Observe employee in ensuring the instrument is ON and PRIMED or if tubes are correctly inserted onto AlveoVac analysis. Familiarized employee in timeframes to replace SIV desiccant, dust barriers and if patient sample collection meet the accepted requirements. Observe employee in charging a minimum of 20cc gas and injection of gas into sample port while ensuring that the forms are properly documented.</i>				
1.4	The employee can successfully perform patient test samples. <i>Observe employee in performing test by ensuring the tubes correctly inserted on Alveo Vac while analysis started. Observe employee in documenting data</i>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology	Policy # QPEMI03001	Page 71 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>SIBO</b>					
	<i>in duplicate.</i>				
1.5	The employee can successfully manage and troubleshoot issues & storage. <i>Observe the employee in troubleshooting issues with samples and accepting timeframes for testing &amp; TAT requirements. Observe employee in proper disposal of "test-done" tubes.</i>				
1.6	The employee can order tests appropriately. <i>Observe proper test ordered as per departmental SOP. Observe proper labelling, specimen processing and labelling of worksheets.</i>				
1.7	The employee can successfully run test: <i>Observe procedure including sample ID comparison, sterile techniques to avoid contamination and proper procedure if followed.</i>				
Employee Feedback:					

**Employee**

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**Trainer**

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 72 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Signature	Date	Trainer Signature	Date
<b>COVID Receptionist</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS); PPE and waste disposal.				
1.2	Understands patient confidentiality and the security of patient information when it comes to sharing information				
1.3	Is able to respond to phone calls from health care providers for COVID and laboratory inquiries (eg. sample receipt, results, turnaround time, expedited testing requests)				
1.4	Documents phone calls in the call window				
1.5	Is able to access and navigate the COVID hotline mailbox				
1.6	Knows to communicate expedited result requests to the relevant technician/technologist				
1.7	Understands how to search for patient test results within the Laboratory Information System				
1.8	Faxes reports to clients and public health units				
1.9	Operates the scanners to digitally file COVID requisitions				
1.10	Is able to correct patient demographics following instructions by the LIS officer				
1.11	Knows how to recognize errors and how to request corrections from our client sites				
1.12	Is able to search for doctor codes through Soft or on CPSO website				
1.13	Knows how to contact LIS officer for the registration of new Doctors/wards for new clients				
1.14	MPAN Report Emailing for COVID and VOC positives				
1.15	Batch fax COVID positive results from UHN,MSH and WCH wards to Toronto Public Health				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 73 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		



1.16	Generate COVID VOC CT value list				
1.17	Generate and print the daily COVID positive, VOC positive and outbreak faxing Public Health Unit list				
1.18	Faxing correction requests to Public Health Laboratory or Sick Kids for VOC WGS reports received from them (e.g. missing/incorrect LIS order number, patient name, etc)				
1.19	Confirm samples received and email COVID specimen manifest to Cleveland Clinic				
1.20	Print COVID specimen manifest from Stage Zero				

**Employee**

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**Trainer**

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 74 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>COVID ACCESSIONING BENCH</b>					
1.1	Trainee is familiar with general lab safety in the laboratory including: <ul style="list-style-type: none"> <li>• Material Safety Data Sheet (MSDS)</li> <li>• Biosafety cabinet use</li> <li>• Required PPE</li> <li>• Safe laboratory practices</li> <li>• Area cleaning/disinfecting procedure</li> <li>• Waste disposal.</li> <li>• Never leave samples unattended</li> </ul>				
1.2	Understand the COVID workflow – Specimen sorting, accessioning, aliquoting, testing, archiving including specimen prioritization throughout process.				
1.3	Understand the process for Pre-Op and Transplant labelled swabs.				
1.4	Has read and understands the COVID job aid manual				
1.5	Understands manual order entry from requisitions: <ul style="list-style-type: none"> <li>• create new patient stays or orders</li> <li>• Health Care mandatory (if provided)</li> <li>• Completion of yellow highlighted mandatory fields</li> <li>• recognized client submitter number</li> <li>• Use of CPSO code for physician or selection from physician in search field by name and address</li> <li>• Test selection by keypad only.</li> </ul>				
1.6	Ensures accurate data entry for each unique patient order, knows to recognize errors and how to request corrections				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 75 of 177
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	



1.7	Familiar with process to contact on call LIS officer for the registration of new Doctors/wards for new clients				
1.8	Is able to identify interfaced samples (order or auxillary numbers) and knows how to troubleshoot "non-received" samples				
1.9	Able to recognize submitting hospital by swab label for interfaced samples				
2.0	Can recognize the different types of media used for COVID testing and able to select the right aliquot tubes for testing.				
2.1	Is able to accept/reject specimens based on Specimen Acceptance Policy				
2.2	Properly cleans specimen tubes, then labels specimen, and aliquot tubes in a safe manner				
2.3	Knows where to place accessioned samples that are ready to be aliquotted				
2.4	Aware of inventory process and use of RFID labels				

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.  
*Signature Date (yyyy-mm-dd)*

**Trainer**

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*Signature Date (yyyy-mm-dd)*

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 76 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>COVID ALIQUOTING BENCH</b>					
1.0	Trainee has read and understood applicable aliquoting SOPs and job aids				
1.1	Understands safety requirements of duties including the required PPE and proper donning and doffing techniques.				
1.2	Able to safety use a Biological Safety Cabinet: <ul style="list-style-type: none"> <li>• Aware of sash use</li> <li>• Minimize contents within hood</li> <li>• clean surfaces and contents prior and after use</li> <li>• airflow should be unobstructed</li> </ul>				
1.3	Understands the priority order of samples to aliquot and the importance of STAT/Pre-op specimens				
1.4	Examines specimens to ensure that the patient demographics match both the original specimen label and the aliquot tube				
1.5	Knowledge and use of safe and aseptic techniques during the aliquoting of specimens Only 1 specimen and matching one aliquot tube should be open at any one time. Under no circumstance should any other specimens or tubes more be open to prevent contamination of samples.				
1.6	Knows where to place aliquotted samples for testing in designated fridge and how to organize by priority/time and type of tube.				
1.7	Knows where to place original sample racks for scanning for storage (for study samples)				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 77 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



1.8	Properly cleans hood surface and working space at end of shift or as required				
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**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 78 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

## BACTERIOLOGY TRAINING

Employee Name: \_\_\_\_\_  
*Print Name*



Trainer Name: \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Vitek Bench</b>					
1.1	Employee has reviewed the Vitek manual with the trainer				
1.2	Employee is aware of how to use the Vitek safely.				
1.3	Technologist is familiar with and able to locate and login to FLEXprep, Vitek 2 Web, and Vitek 2 Systems				
1.4	Technologist is able to calibrate DensiCHEK using standards and document results. Familiar with use to correctly prepare a 0.5 McFarland for clinical samples.				
1.5	Technologist is able to program Vitek GN or GP identification card on FLEXprep				
1.6	Technologist is able to program both identification + susceptibility card on FLEXprep				
1.7	Technologist is able to program susceptibility card on FLEXprep <ul style="list-style-type: none"> <li>• Technologist knows how and when to enter organism ID</li> <li>• Technologist is able to enter offline AST tests</li> </ul>				
1.8	Technologist is aware of hitting F10 "Send Cassette" when finished programming a cassette and other hot keys				
1.9	Technologist is able to load/unload cassettes onto the Vitek				
1.10	Technologist knows how to review				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology	Policy # QPEMI03001	Page <b>79</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Vitek Bench</b>					
	cassette after loading on Vitek by checking "Cassette View" on Vitek 2 Systems <ul style="list-style-type: none"> <li>Technologist is able to troubleshoot and correct data if not loaded correctly</li> </ul>				
1.11	Technologist is able to perform Daily Review by checking the worklist on Vitek 2 System <ul style="list-style-type: none"> <li>Technologist is able to correct orders with missing data</li> <li>Technologist is able to change isolate numbers/Choose a low discrimination identification/ change order numbers/ and enter AST offline tests</li> </ul>				
1.12	Technologist is able to edit and delete cards both in progress and completed				
1.13	Technologist is able to search for reports and print reports if required				
1.14	Technologist is able to search long-term data storage for reports and print reports if required				
1.15	Technologist is able to change pipette tips and saline using aseptic techniques <ul style="list-style-type: none"> <li>Technologist is able to perform dispenser/pipettor diagnostic test</li> </ul>				
1.16	Technologist knows where to find Biomerieux contact information in the SOP and on the Vitek and is able to identify the serial number of the Vitek				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>80</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	
		Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Vitek Bench</b>					
1.17	<b>QC bench technologist</b> is aware of the processes and procedures of performing QC on new shipments of Vitek ID/susceptibility cards <ul style="list-style-type: none"> <li>• They are able to program QC strains on FLEXprep</li> <li>• They are able to review cards with QC deviation</li> <li>• They are able to review cards that passed QC</li> <li>• They are able to accession new lots/shipments of cards onto Vitek System</li> </ul>				
Employee Feedback:					



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>81</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>WASPLAB Bench</b>					
1.1	Employee is familiar with WASPLab manuals				
1.2	Employee is familiar with components (WASP, Lines, Imaging station, Incubator, Server, Web application workstation) including the purpose of stackers of the WASPLab system				
1.3	Employee is able to work safely with the WASPLab system.				
1.4	Employee understands the workflow of the WASPLab system from WASP to Web Application including the purpose of all the stackers.				
1.5	Employee is aware of frequency of maintenance and QC to be completed and able to perform required related tasks (Conveyor, stackers, imaging module, incubator maintenance)				
1.6	Employee understands general troubleshooting of WASPLab system				
1.7	Employee is familiar with the overview of the WASPLab Web application				
1.8	Employee can successfully use the screening, reading and picking applications to process plates.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 82 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>83</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Area/Competency	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>TREK Sensititre System</b>					
1.1	Employee has reviewed the TREK Sensititre manual.				
1.2	Employee is familiar with the principle of the TREK Sensititre System including maintenance and basic trouble shooting				
1.3	Employee is familiar with the proper procedure of setting up the MIC panel by using Sensititre AIM auto-inoculator				
1.4	Employee is familiar with the proper procedure of incubating the MIC panel in O2 incubator for 24h				
1.5	Employee is familiar with the procedure of checking purity plate and colony count with $\geq 30$ colonies as acceptable. Inform the senior if the colony count is less than 30				
1.6	Employee is familiar with the “SWIN” icon on the OptiRead screen				
1.7	Employee is familiar with all the icons on the “Isolates in Progress” screen				
1.8	Employee is familiar with the proper procedure for obtaining the MIC values by using Sensititre OptiRead				
1.9	Employee is able to review and accept the result, and inform the senior if there are warnings				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>84</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.10	Employee is familiar with the proper procedure of manual panel reading by using Sensititre Manual Viewer mirror when the Sensititre OptiRead is not functioning and record the MIC results in the panel demographic sheet				
1.11	Employee is familiar with the proper procedure of manual panel reading by using “Vizion” as back up				
1.12	Employee is familiar with the proper daily disinfection of the working area				
1.13	Employee is able to search for previously completed results				
1.14	Employee is familiar with the proper procedure of setting up QC organism and obtaining the QC results by using QC icons				
1.15	Employee is familiar with the proper procedure of obtaining the new panel lot and registering it in the TREK system				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 85 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Maldi-Vitek MS</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the principle of the Vitek MS instrument including maintenance and basic troubleshooting				
1.3	Employee is familiar with the proper procedure for Vitek MS preparation using slide, pipette, control and matrix/FA				
1.4	Employee is able to locate and log in to MYLA and can navigate the dashboard to Flexprep				
1.5	Employee knows how to scan slide and add Bench ID				
1.6	Employee is familiar with the proper procedure for entering specimen numbers into Vitek MS prep station and differentiating bacteria/fungi				
1.7	Employee knows how to skip a spot and erase and re-enter spot information				
1.8	Employee is familiar with the proper procedure for loading/unloading slide into Vitek MS				
1.9	Employee is familiar with the process for re-applying failed calibrator E.coli ATCC 8739				
1.10	Employee is familiar with the procedure of applying mucoid /dry /other organism onto the slide				
1.11	Employee knows how to open Vitek MS software from MYLA dashboard and how to go to Results to Review				
1.12	Employee is familiar with the procedure to review/search/print results				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 86 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Maldi-Vitek MS</b>					
	in MYLA, including reviewing by Bench and Specimen Number				
1.13	Employee is familiar with importance of verifying MS label matches plate label when not making preps at MS prep station				
1.14	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into SOFT TotalQC				
1.15	Employee is aware that Isolates with confidence values >98% can be auto reviewed, and knows how to check reviewed results				
1.16	Employee is aware of how to change isolate number of specimen once it's been reviewed, if necessary				
1.17	Employee is familiar with the proper daily disinfection of the work area				
1.18	Employee is familiar with storage of MS slides after use				
1.19	Employee is familiar with ID acceptability /unactable guidelines as per Vitek MS manual.				
1.20	Employee is familiar with the fact that MS results must correlate with what is growing in the culture and repeat testing if they do not				
1.21	Employee is familiar with possibility of cross-contamination of test wells with the control well or other organisms if care is not taken when inoculating.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 87 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Maldi-Vitek MS</b>					
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>88</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Respiratory Bench</b>					
1.1	The employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the proper reading and reporting of Gram stains.				
1.3	Employee is familiar with the policy concerning the rejection criteria of sputum specimens				
1.4	Employee is familiar with the protocol for quantitation of cultures				
1.5	Employee is familiar with the culture media and reagents used in this section				
1.6	Employee is familiar with the common respiratory pathogens include probable and possible organisms.				
1.7	Employee is familiar with procedures used for identifying and performing susceptibility tests on significant isolates				
1.8	Employee has demonstrated the ability to generate appropriate and accurate reports in accordance with the laboratory manual				
1.9	Employee is familiar with the policy concerning the work up of yeasts and the referral of moulds to mycology				
2.0	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
2.1	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
2.2	Employee has demonstrated the ability to enter isolates into the SoftStore				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>89</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
	program				
2.3	Employee is familiar with the proper daily disinfection of the work area				
2.4	Employee is aware of bench workflow and duties.				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>90</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Urine Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the culture media and reagents used in the section				
1.3	Employee is familiar with the significance of the urine colony counts				
1.4	Employee is familiar with procedures used for identifying and performing susceptibility tests on significant isolates				
1.5	Employee has demonstrated the ability to enter results into the LIS using batch entry				
1.6	Employee has demonstrated the ability to generate appropriate and accurate reports in accordance with the laboratory manual				
1.7	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.8	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
1.9	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.10	Employee is familiar with the proper daily disinfection of the work area				
1.11	Employee is aware of bench workflow and duties.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>91</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>92</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Miscellaneous/Wound Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the correct incubation times and atmospheres for each type of medium and specimen				
1.3	Employee is familiar with the workflow routines and work lists				
1.4	Employee is familiar with the proper use and maintenance of the anaerobic holding tank				
1.5	Employee is familiar with the proper use of the anaerobic jars, and QC documentation of the biological controls				
1.6	Employee is familiar with the policies concerning the work up and reporting of anaerobes				
1.7	Employee is familiar with the appropriate use of susceptibility tests as specified in the manual for each client/specimen				
1.8	Employee has demonstrated the ability to generate appropriate and accurate reports in accordance with the laboratory manual				
1.9	Employee is familiar with the proper practice for the set up and incubation of the oxacillin and vancomycin screen, CRE procedure and high level aminoglycoside plates				
1.10	Employee is familiar with the procedure to refer isolates to PHL and referral of yeast and moulds to mycology				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>93</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.11	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.12	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
1.13	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.14	Employee is familiar with the proper daily disinfection of the work area				
1.15	Employee is aware of bench workflow and duties.				
Employee Feedback:					

### **Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



### **Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 94 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Gynae &amp; Enterics Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the proper procedure for interpreting and reporting of gram stains and wet preps				
1.3	Employee is familiar with the culture media, appropriate incubation times and conditions and reagents used in the section				
1.4	Employee is familiar with the colonial morphology of the pathogens encountered on this bench				
1.5	Employee is familiar with the criteria for setting up identification and susceptibility tests				
1.6	Employee has demonstrated the ability to enter results into the LIS using batch entry				
1.7	Employee is familiar with the procedure for performing serological tests on isolates				
1.8	Employee is familiar with the procedure for performing the following: API NHI card, Gonogen, TSI, ONPG-PAM, Urea, TSB				
1.9	Employee has demonstrated the ability to generate appropriate and accurate reports in accordance with the laboratory manual				
1.10	Employee is familiar with the procedure to refer isolates to PHL and referral of yeast and moulds to mycology				
1.11	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.12	Employee has demonstrated the ability to perform QC testing associated with the				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology	Policy # QPEMI03001	Page <b>95</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
	bench and is able to enter the results into MicQC				
1.13	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.14	Employee is familiar with the proper daily disinfection of the work area				
1.15	Employee is aware of bench workflow and duties.				
Employee Feedback:					

### **Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

### **Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>96</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>STAT Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the basic functions of the Virtuo including basic troubleshooting.				
1.3	Employee is familiar with reading BC gram stains reporting and communicating BC gram stains.				
1.4	Employee is familiar with checking and resulting worklists				
1.5	Employee understand how to analyze and process daily status and error reports.				
1.6	Employee is familiar with duties relating to the bench during all shifts as per Bench duties manual.				
1.7	Employee is familiar with dealing with anonymous and orphan bottles in Virtuo				
1.8	Employee is familiar with processing "no bacteria seen"				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**



I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

UNIVERSITY HEALTH NETWORK/MOUNT SINAI HOSPITAL, DEPARTMENT OF MICROBIOLOGY

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 97 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Blood Culture Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the principle of the Virtuo instrument and blood culture bottle media				
1.3	Employee is familiar with the proper procedure for testing and reporting requests for: SBE/IE, PUO/FUO Dimorphic fungus Cryptococcus Brucella Bone marrow Bone bank Sterile fluids				
1.4	Employee understands the workflow of positives throughout all shifts.				
1.5	Employee is familiar with the Virtuo <ul style="list-style-type: none"> <li>• Check graphs</li> <li>• Load, re-load, remove bottles</li> </ul>				
1.6	Employee is familiar with the culture media, incubation times and reagents used in the section.				
1.7	Employee understands identification tests and MALDI requirements for BC isolates				
1.8	Employee is familiar with the appropriate use of susceptibility tests as specified in the manual for each client/specimen				
1.9	Employee has demonstrated the ability to generate appropriate and accurate reports in accordance with the laboratory manual				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>98</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.10	Employee is familiar with the procedure to refer isolates to PHL and referral of yeast and moulds to mycology				
1.11	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results to ward/physician/ Infectious Disease resident				
1.12	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
1.13	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.14	Employee is familiar with the proper daily disinfection of the work area				
1.15	Employee is aware of notification procedure for blood culture isolates to ward/physician/ICP/ID by phone or email as appropriate as per BC manual or isolate notification manual.				
1.16	Employee is aware of other bench duties				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>99</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>100</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Infection Control - MRSA</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the design of the media, incubation requirements and colonial morphology of significant isolates on selective media used on the bench				
1.3	Employee is familiar with the work up of new and previous positive samples.				
1.4	Employee is familiar with the identification tests used on the bench.				
1.5	Employee is familiar with the appropriate use of susceptibility tests as specified in the manual for each client/specimen and understands the significance of each. (Oxacillin Screen, Denda, E test testuls, MIC results)				
1.6	Employee is familiar with the need and procedure to refer isolates.				
1.7	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.8	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
1.9	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.10	Employee is familiar with the proper daily disinfection of the work area				

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>101</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.11	Employee is familiar with duties and workflow				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>102</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Infection Control Bench - VRE</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the design of the media, incubation requirements and colonial morphology of significant isolates on selective media used on the bench				
1.3	Employee is familiar with the work up of new and previous VRE tests				
1.4	Employee is familiar with the identification tests used on the bench				
1.5	Employee is familiar with and understands the significance and reporting sensitivity results (Vanc screen, E tests, PCR)				
1.6	Employee is familiar with the appropriate use of susceptibility tests as specified in the manual for each client/specimen				
1.7	Employee is familiar with the procedure to refer isolates to PHL or NML.				
1.8	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.9	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				
1.10	Employee has demonstrated the ability to enter isolates into the SoftStore program				
1.11	Employee is familiar with the proper daily disinfection of the work area				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>103</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.12	Employee is familiar with duties and workflow				
1.13	Trainee is aware of PCR procedure, sterile techniques and resulting, maintenance of Cepheid/Lightcycler.				
1.14	Trainee understands the processing and resulting of direct PCR specimens.				
1.15	Trainee is familiar with preparing necessary specimens for PFGE.				
1.16	Trainee is familiar with preparing and processing specimens for broth culture.				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>104</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Infection Control Bench - CRE /ESBL</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the design of the media, incubation requirements and colonial morphology of significant isolates on selective media used on the bench				
1.3	Employee is familiar with the work up of new ESBL, CRE				
1.4	Employee is familiar with the work up of previous positive ESBL, CRE				
1.5	Employee is familiar with the identification tests used on the bench				
1.6	Employee is familiar with the work up of specimens.				
1.7	Employee is familiar with and understands the significance and reporting of meroscreen, bcarba, PCR preliminary and confirmatory results.				
1.8	Employee is familiar with the appropriate use of susceptibility tests as specified in the manual for each client/specimen				
1.9	Employee is familiar with the need and procedure to refer isolates to PHL or NML.				
1.10	Employee is familiar with the policy concerning notification of Infection Control and the phoning of critical value results				
1.11	Employee has demonstrated the ability to perform QC testing associated with the bench and is able to enter the results into MicQC				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\





  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>106</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

*Print Name*

*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>GeneXpert Training (please circle) - VRE / C.difficile / CRE / Enterovirus</b>					
1.1	Trainee is familiar with the general lab safety in the microbiology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee is aware of instrument procedure, maintenance and basic troubleshooting of instrument				
1.3	Trainee understand the acceptable specimen type, volume and specimen preparation, freeze/thawing procedure.				
1.4	Trainee has reviewed the test manual in the Microbiology Manual				
1.5	Trainee is familiar with the proper procedure for reporting results and possible combination of results.				
1.4	Trainee is aware of proper cartridge disposal.				
1.5	Trainee is familiar with storing samples after testing is completed.				
1.6	Trainee is aware of documentation of QC and external controls.				

Employee Feedback:



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>107</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_ , on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_ , on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>108</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

*Print Name*

*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Quality Control Bench</b>					
1.1	Familiar with functions in SoftTotalQC: lot registration, inactivate and active lot, enter QC results.				
1.2	Register all items to be QC into SoftTotalQC				
1.3	Perform required equipment, reagent, media QCs and enter results into SoftTotalQC.				
1.4	Register and perform QC on items not in SoftTotalQC.				
1.5	Vitek QC: <ul style="list-style-type: none"> <li>– registration new lot in Vitek</li> <li>– prepare weekly load list</li> <li>– Set up Vitek QC panels</li> <li>– Review Vitek QC results</li> <li>– enter QC action in SoftTotalQC</li> </ul>				
1.6	Perform required Kirby Bauer and e-test QCs and enter results into SoftTotalQC.				
1.7	Check reagent cart to ensure reagent in use are the active lot in SoftTotalQC and are not expired.				
1.8	Perform Kirby Bauer disks inventory monthly.				
1.9	Subculture working QC organisms weekly				
1.10	Subculture stock QC organisms from the freezer monthly.				
1.11	Subculture lyophilized stock QC organisms for the freezer annually.				
1.12	Daily Environmental and Bone Bank Sterility Culture reading, workup & reporting.				
1.13	Process for Pharmacy samples following GMP guidelines including positive sample work up and notification.				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>110</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>PFGE Bench</b>					
1.1	Employee has reviewed the manual with the trainer				
1.2	Employee is familiar with the work flow of the PFGE bench				
1.3	Employee is familiar with the testing schedule				
1.4	Employee is familiar with the test ordering in LIS and in BioNumerics				
1.5	Employee is familiar with PFGE gel record sheet				
1.6	Employee is familiar with broth labeling and inoculation in preparation for MRSA, VRE, Serratia and Other typing				
1.7	Employee is familiar with extraction procedure: standardization and plug making, lysis, PK, plug washing				
1.8	Employee is familiar with restriction procedure: enzyme preparation				
1.9	Employee is familiar with Gel preparation and Loading				
1.10	Employee is familiar with the Setting for CHEF-DR II/III machine				
1.11	Employee is familiar with the Staining procedure and safety, precaution and disposal of ethidium bromide and wearing proper PPE				
1.12	Employee is familiar with using Gel DOC XR+Camera to take gel picture and save in files				
1.13	Employee is familiar with criteria for assessing gel quality				

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>111</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>PFGE Bench</b>					
1.14	Employee is familiar with BioNumerics gel analysis procedure				
1.15	Employee is familiar with BioNumerics naming CMRSA				
1.16	Employee is familiar with reporting in LIS				
1.17	Employee is familiar with Comparison request procedure including both in-house and to PHOL, comparing and Interpreting a cluster in BioNumerics, sending a report by email, and document comparison request in Query log sheet in T drive				
1.18	Employee is familiar with maintenance of CHEF machine on each run, on weekly, on monthly, and on yearly basis and QC procedure of the machine				
1.19	Employee is familiar with the documentation of gel run record in T drive				
1.20	Employee is familiar with preparing plug of the Salmonella ser Branderup H9812 Standard Strain				
1.21	Employee is familiar with reagent preparation including working and stock reagents				
1.22	Employee is familiar with maintenance procedure of water bath, incubator shaker, PH meter and Balance				
1.23	Employee is familiar with inventory checking, in-house enzyme TBE ordering and pick up the TBE from 9th floor				
1.24	Employee is familiar with the proper daily disinfection of the work area				
Employee Feedback:					

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>112</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>113</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

## SEROLOGY & VIROLOGY TRAINING

Employee Name: \_\_\_\_\_



Trainer Name: \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Virology Accessioning Bench</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the SOP for accessioning in the Molecular Manual.				
1.3	Trainee has reviewed : Accessioning and ordering of specimens for Virology PCR tests following the Virology Specimen Accessioning Guide. Also includes accessioning blood/Urine samples for BKV PCR, EBV PCR and CMV PCR.				
1.4	Trainee is aware of duties including EasyMag extraction and CSF/serum crypto.				
1.5	Trainee has been instructed as to : The filling of requisitions for all NML tests, and place specimen in NML box in -20C freezer MIFTW when required.				
1.6	Trainee is aware of QC to be done and documentation required.				
1.7	Trainee is instructed to do all the filing of PCR & Serology results.				
1.8	Trainee is familiar with reporting and calling all Positive results.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>114</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.9	Trainee is instructed to: Store daily all samples in -70C freezer.				
Empl oyee Feed back:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>115</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Alinity Bench</b>					
1.1	The trainee has reviewed safety aspects including: a. The features of a Biosafety Containment 2 Lab. b. Virus Material Safety Data Sheet (MSDS) c. Operation of a Biosafety Cabinet d. Use of disinfectants and waste disposal				
1.2	The trainee is familiar with the different parts of the analyzer, proper temperature requirements for reagents kits, wash buffers and bulk solutions.				
1.3	The trainee has reviewed the Alinity procedure manual on how to properly navigate the Home screen and what to do when yellow warning signal appears.				
1.4	The trainee has reviewed the procedures relating to receiving, proper mixing and documenting the "received date" and "in-use date with each reagent, control kits and calibrators.				
1.5	The trainee is familiar with how to inspect potential defects of control or reagent cassette, load/unload reagents, load new supplies and how to update supply status.				
1.6	The trainee is familiar with the Alinity Manual relating to the procedures of performing the daily, and weekly maintenance on Alinity.				
1.7	The trainee is familiar with the procedure of running controls including ordering of controls, the frequency of running controls, activation in LIS for new lot #, when to run external controls and what				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>116</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	


#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
	controls to run on weekends/holidays.				

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.8	The trainee is familiar with QC rule violations, knows the difference between WARNING flag and REJECT flag; Knows how to add comments in Alinity and how to proceed with a WARNING or REJECT flag.				
1.9	The trainee has reviewed the procedure on how to post the QC results daily.				
1.10	The trainee has reviewed the Serology Manual relating to the testing of all the hepatitis markers and assays. The trainee understands testing for routine patients versus living and cadaveric donors. The trainee understands reflex testing for various assays.				
1.11	The trainee is familiar with how to pull and run previously frozen samples.				
1.12	The trainee has reviewed the Serology Manual relating to how and when to post or not post certain results and when to run reflex testing.				
1.13	The trainee has reviewed the Serology Manual relating to performing HBsAg Qual II Confirmatory Assay.				
1.14	The trainee understands the importance of doing STAT HBsAg Qual II and HIV Ag/Ab for patients from case room with no prenatal workup and on sending specimen to PHL for HIV testing afterwards; this also includes STAT				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

 Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>117</b> of <b>177</b>
		Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

	serology testing for Occupational Health on needlestick incidents: source and staff, <u>rapid HIV testing for UHN Emergency only.</u>				
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#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.15	The trainee is aware of rejection protocols including observing for hemolysis and heat-inactivated samples				
1.16	The trainee has reviewed the Serology Manual relating to 'Pending List' on LIS and check the pending list daily.				
1.17	The trainee has reviewed the testing procedure for TGLN samples, reflex testing associated with positive results for donor testing and entering/checking results into iTransplant				
1.18	The trainee is aware of phoning not only significant POSITIVE results but also any NSQ/Invalid/Not Tested result pertaining to donor testing.				
1.19	The trainee has reviewed the Serology Manual relating to the weekly checking of the supplies according to the inventory list.				
1.20	The trainee is familiar with all the duties assigned to Alinity Bench.				
Employee Feedback:					



### **Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>118</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the  
bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>119</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>AltoStar</b>					
1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
2	Trainee has reviewed the procedure in the Microbiology Manual				
3	Employee is familiar with the use of proper specimen type and storage				
4	Employee is aware of recording available tests left <u>correctly</u> for each Master Mix after PCR set-up				
5	Employee is familiar with Loading reagents into the instrument, unloading from the instrument and proper disposal of the waste.				
6	Trainee has reviewed and understand the different possible combination of results: Negative, Positive and Invalids				
7	Employee has been trained on AltoStar and is familiar with all the instrument components, Reagents, Consumables and their locations				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>120</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	



**Employee**

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*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>121</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Architect Bench</b>					
1.1	The trainee has reviewed safety aspects including: a. The features of a Biosafety Containment 2 Lab. b. Virus Material Safety Data Sheet (MSDS). c. Operation of a Biosafety Cabinet. d. Use of disinfectants and waste disposal.				
1.2	The trainee has reviewed the Serology Procedure Manual relating to the testing of all the hepatitis markers and assays The trainee understand testing for patient versus living and cadaveric donors. The trainee understands reflex testing rules and review George Washington Study Protocol.				
1.3	The trainee has reviewed the Serology Procedure Manual relating to the procedures of performing the daily , and weekly maintenance on Architect.				
1.4	The trainee has reviewed the Serology Procedure Manual relating to which and when to run each of the external controls.				
1.5	The trainee has reviewed the Serology Procedure Manual relating to how and when to post or not post certain results.				
1.6	The trainee has reviewed the Serology Procedure Manual relating to Appendix - the Daily Work-up for Architect bench				
1.7	The trainee has reviewed the Serology Procedure Manual relating to performing the HBsAg Q2 Confirmation Assay.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology	Policy # QPEMI03001	Page 122 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.8	The trainee has reviewed the Serology Procedure Manual relating to the weekly checking of the supplies according to the inventory list.				
1.9	The trainee has reviewed the Serology Procedure Manual relating to documenting the 'rec'd date' and 'in-use date' with each reagent kit, controls kit and calibrators.				
1.10	The trainee has reviewed the procedure manual on how to use the Snap Shot screen, what to do when yellow warning signal appears.				
1.11	The trainee has reviewed the Serology Procedure Manual relating to 'Pending List' on LIS, and check the pending list daily.				
1.12	The trainee understands the importance of doing STAT HBsAg and HIV Ag/Ab for patients from case room with no prenatal workup, and on sending specimen to PHL for HIV testing afterward. Also STAT testing for Occupation Health regarding needle stick incident :source and staff.The trainee has reviewed the Serology Procedure Manual relating to 'Pending List'.				
1.13	The trainee has reviewed the procedure on how to post the QC results daily.				
1.14	The trainee is aware of rejection protocols including observing for hemolysis and reflex testing on older archived samples.				
1.15	The trainee has reviewed the testing procedure for TGLN samples, the reflex testing associated with positive results for donor testing and entering/checking				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>123</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



	results into <i>itransplant</i> .			
Employee Feedback:				

**Employee**

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materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 124 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**ARIES® C. difficile Testing**



See training checklist [Aries C.difficile Checklist](#) above.

**ARIES® HSV/VZ Testing**

See training checklist [ARIES® HSV/VZ Testing](#) above.

**ARIES® SARS-CoV-2 PCR Testing**

See training checklist [Luminex Aries ® SARS-CoV-2 PCR Testing](#) above.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 125 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Biorad CFX96 Deep Well ThermoCycler</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedure for: Human Metapneumovirus and Parainfluenza RT-PCR on Bio-Rad CFX96				
1.3	Trainee has reviewed the procedure manual and is familiar with the principles and procedures for: BKV PCR on Bio-Rad CFX96 EBV PCR on Bio-Rad CFX96				
1.4	Trainee has reviewed and made aware of the validation parameters for Quantitative PCRs' (ie. BKV, EBV, and CMV). Trainee can locate the target graph and where to find the slope, PCR efficiency, and the R <sup>2</sup> value.				
1.5	Trainee has reviewed the procedure manual and is familiar with the principles and procedure for: <ul style="list-style-type: none"> <li>• alpha Herpes PCR on Bio-Rad CFX96</li> <li>• Adenovirus PCR on Bio-Rad CFX96</li> <li>• Parvovirus B19 PCR on Bio-Rad CFX96</li> </ul>				
1.6	Trainee has reviewed the procedure manual and is familiar with the operation of the:				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology	Policy # QPEMI03001	Page <b>126</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Da Date (yyyy-mm-dd)te
	a) Instructions for Pipetting by Eppendorf epMOTION  b) Using the epMotion to pipette Bio-Rad 96 Deep well plates				
1.8	Trainee has been shown and can perform the following tasks in the Sorvall ST40 Centrifuge: a) Change the rotor to Microplate carriers  b) Centrifuge a Bio-Rad reaction microplate				
1.9	Trainee is aware of the general precautions related to PCR procedures including: a. The physical separation of specimens, standards and control materials, master mix and amplicons into areas (sample preparation area, clean room and detection area). b. The proper use of gloves, gowns, filtered pipette tips and the danger of ribonuclease contamination. c. The specific storage and working temperatures for reagents and the need to mix and centrifuge components. d. The maximum number of freeze-thaw cycles for samples and reagents. e. The need to work quickly in the cooling block.				
1.10	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations:				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 127 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Da Date (yyyy-mm-dd)te
	a. Internal QC b. External QC c. Positive Control & Quantification Standards d. Negative Control & Non template Control (NTC) -H <sub>2</sub> O				
1.11	Trainee is familiar with the Biorad CFX96 Deep Well Real Time System operation including: <ol style="list-style-type: none"> <li>a. Setting up a run and saving the run.</li> <li>b. Making and importing the worklist.</li> <li>c. Use and interpretation of different fluorophore channels (FAM, HEX, Texas Red, Cy5 &amp; Quasar 705).</li> <li>d. Knowing how to do a mix run i.e. 2 or 3 viruses with in the same PCR run.</li> <li>e. Quantitative Analysis (BKV, EBV, CMV) Understanding the different parameters of a valid PCR run such as the PCR Efficiency, R<sup>2</sup>. &amp; M slope.</li> <li>f. Qualitative Analysis of different viruses such as alpha Herpes, Parvovirus B19, Adenovirus, and CMV.</li> <li>g. Knowing how to set the threshold of the quantitative and qualitative PCR runs.</li> <li>h. Exporting the results.</li> <li>i. Access and use of trouble-shooting information.</li> </ol>				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>128</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Da Date (yyyy-mm-dd)te
1.12	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: a. Interpretation of graphs and fluorophores. b. Detection and extraction of results using the Bio-Rad software and hardware including printing and reporting of results.				
1.13	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: a. Sample preparation and nucleic acid isolation using the Qiagen Spin Column. b. Amplification using Altona WNV RT PCR and related equipments. c. Detection and extraction of results using the Biorad CFX Deep Well Real Time System software and hardware including the printing of results, interpretation and reporting of WNV PCR.				
Employee Feedback:					





  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>129</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>130</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>BioFire FilmArray Encephalitis Panel Testing</b>					
1.1	Employee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Employee has reviewed the testing procedure in the Microbiology Manual.				
1.3	Employee has reviewed and understands acceptable specimens for testing.				
1.4	Employee is aware of specimen processing including: <ul style="list-style-type: none"> <li>• opening ME panel pouch only when ready to inoculate sample,</li> <li>• ME panel pouch must be loaded within 30 minutes after opening.</li> </ul>				
1.5	Employee is aware of ensuring the vacuum seal is intact when opening new FilmArray ME pouch.				
1.6	Employee is aware of scheduled maintenance required				
1.7	Employee has reviewed and understood result reporting procedure.				
1.6	Employee is aware of QC requirements				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>131</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>132</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_

*Print Name*

*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>easyMAG Bench</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the easyMAG <ul style="list-style-type: none"> <li>• General operation</li> <li>• System Startup</li> </ul> Maintenance (daily & weekly)				
1.3	Trainee has reviewed the procedure manual and is familiar with the easyMAG System Description: <ul style="list-style-type: none"> <li>• Workload Area</li> <li>• Reagent module</li> <li>• Processing Area</li> <li>• Bar-code reader</li> <li>• On/Off Power Switch</li> </ul> Consumables				
1.4	Trainee has reviewed the procedure manual and is familiar with the easyMAG <ol style="list-style-type: none"> <li>a. General extraction process</li> <li>b. Respiratory extraction process</li> <li>c. CSF extraction process</li> <li>d. Human plasma process</li> <li>e. Whole blood extraction</li> </ol>				
1.5	Trainee is familiar with the different Internal Controls (IC) and the required volumes required for extraction.				
1.6	Trainee is familiar with storing samples and eluates.				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>134</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Roche cobas® 6800 CT/NG Bench Training</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the SOP for Chlamydia trachomatis and Neisseria gonorrhoeae PCR by Cobas 6800 in the Microbiology Manual				
1.3	Trainee is familiar with Loading reagents into the instrument, unloading from the instrument and proper disposal of the waste.				
1.4	Trainee understands the different test codes, sample types, requirement for order number “99” extensions, can troubleshoot for dry swab, double swab, and multiple swab specimens.				
1.5	Trainee has reviewed and understands the different possible combination of results: Negative, Positive, Invalid, as well as the necessary reporting requirements for each result.				
1.6	Trainee knows how to order, and send out all <b><u>MALE RECTAL or “LGV suspected”</u></b> swabs that are positive for Chlamydia to NML for LGV testing				
1.7	Trainee has reviewed the test codes of the <b>worklist</b> , and knows they will be responsible for pending tests on these worklists.				
1.8	The trainee is aware of the right color-coded racks for sample loading.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 135 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.9	Trainee is aware of inspecting Reagent cassette, Control cassette and pipette tips for any defect before loading into the instrument				
2.0	Trainee has been trained on Cobas 6800 and is familiar with all the instrument components, Reagents, Consumables and their locations				
2.1	Trainee knows not to mix Cobas 6800 lysis reagent with bleach				
2.2	Trainee has reviewed the cobas® 6800 Daily, Weekly, and Monthly Maintenance requirements.				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>136</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	



**Employee**

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**Trainer**

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>137</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Roche cobas® 6800 HPV Bench Training**

Employee Name: \_\_\_\_\_  
*Print Name*



Trainer Name: \_\_\_\_\_  
*Print Name*

#	Area/Competency	Trainee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; disinfection and waste disposal, and follow good laboratory practice, such as aseptic technique, changes of PPE as needed.				
1.2	Trainee has reviewed Roche 6800 HPV testing procedure in the Microbiology Manual.				
1.3	Trainee has reviewed and understands the procedure of preparing different samples types. <ul style="list-style-type: none"> <li>• ThinPrep</li> <li>• SurePath</li> <li>• Tissues in paraffin</li> </ul>				
1.4	Trainee is aware of pre-treat temperature for SurePath is 95°C				
1.5	Trainee knows samples require accession number “99” extensions.				
1.6	Trainee is familiar with HPV testing workflow.				
1.7	Trainee is familiar with loading and unloading reagents from the				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>138</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

	instrument and proper disposal of the waste.				
1.8	Trainee is aware of inspecting Reagent and Control cassettes, pipette tips and processing plates for any defect and ensure control cassette is flat before loading into the instrument.				
1.9	Trainee has been trained on Cobas 6800 and is familiar with all the instrument components, reagents, consumables and their locations.				
20.	The trainee is aware of the right colour-coded racks for sample loading.				
2.1	Trainee knows how to check pending.				
2.2	Trainee has reviewed the cobas® 6800 Daily, Weekly, and Monthly Maintenance requirements.				
2.3	Trainee knows not to mix Cobas 6800 lysis reagent with bleach.				
2.4	Trainee is familiar with reviewing results and recording of CT values in LIS and checking QC results before releasing patients' results.				
2.5	Trainee is familiar with troubleshooting processing flags.				
<b>Trainee Feedback:</b>					

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>139</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>140</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**cobas 6800 WNV/MPX Bench Training**

**Trainee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Trainee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>cobas 6800 WNV / MPX PCR Testing</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed Roche 6800 MPX and WNV testing procedure in the Microbiology Manual.				
1.3	Trainee has reviewed and understands the procedure of preparing and processing samples for different assays: WNV and MPX (Cadervic vs Living donor samples).				
1.4	Trainee is familiar with Loading reagents into the instrument, unloading from the instrument and proper disposal of the waste.				
1.5	The trainee is aware of calling not only positive MPX and WNV results but also any NSQ/Invalid/Not tested results				
1.6	Trainee has reviewed and understands the different possible combination of results.				
1.7	The trainee is aware of the right color-coded racks for sample loading.				
1.8	Trainee is aware of inspecting Reagent cassette, Control cassette and pipette tips for any defect before loading into the instrument				
1.9	Trainee has been trained on Cobas 6800 and is familiar with all the instrument components, Reagents, Consumables and their locations				
2.0	Trainee knows not to mix Cobas 6800 lysis reagent with bleach				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>141</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		



#	Area/Competency	Trainee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
Trainee Feedback:					

**Trainee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>142</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

### Cobas 6800 CMV Bench Training

**Trainee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Trainee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Cobas 6800 CMV PCR Testing</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed Roche CMV testing procedure in the Microbiology Manual.				
1.3	Trainee has reviewed and understands the procedure of preparing and processing samples for CMV assay				
1.4	Trainee is aware of plasma separation if testing is delayed more than 24 hours after collection				
1.5	Trainee is aware of the testing schedule including cut-off times for BMT clinic specimens.				
1.6	Trainee is aware on how to accession, process CMV from all clients				
1.7	Trainee is familiar with loading reagents into the instrument, unloading from the instrument and proper disposal of the waste.				
1.5	The trainee is aware of the right color-coded racks for sample loading.				
1.6	Trainee is familiar with the rules of communicating results listed in the manual				
1.8	Trainee is aware of inspecting Reagent cassette, Control cassette and pipette tips for any defect before loading into the instrument				
1.7	Trainee has been trained on cobas 6800 and is familiar with all the instrument components, Reagents, Consumables and their locations				
1.8	Trainee knows Not to mix cobas 6800 lysis				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>143</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Trainee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
	reagent with bleach				
Trainee Feedback:					

**Trainee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>144</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_

**Trainer Name:** \_\_\_\_\_



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Mono / VZ Ab / CMV Immucor Tests</b>					
1.1	The trainee has reviewed safety aspects including: a. The features of a Biosafety Containment 2 Lab. b. Virus Material Safety Data Sheet (MSDS). c. Operation of a Biosafety Cabinet. d. Use of disinfectants and waste disposal.				
1.2	The trainee has reviewed the Serology Procedure Manual for the test procedure.				
1.3	The trainee has reviewed the Serology Procedure Manual relating to the interpretation and reporting of results, including calling all positive to physician/ward.				
1.4	The trainee has reviewed the Serology Procedure Manual relating to the running of external QC.				
1.5	The trainee is aware of documentation of external controls and inventory in use.				
1.6	The trainee is aware of storage locations for all specimens.				
1.7	The trainee is aware of use of all equipment and maintenance.				
1.8	The trainee is aware of reporting and reflex testing if needed.				
1.9	Trainee is aware of phoning any NSQ/Not Test results for CMSE.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>145</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>146</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_

*Print Name*

**Trainer Name:** \_\_\_\_\_

*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Luminex Aries ® FLU A/B &amp; RSV Bench</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the SOP in the Live Manual > Molecular Diagnostic Test Manual> Influenza A/B & RSV PCR by Luminex Aries				
1.3	Trainee has reviewed : <ul style="list-style-type: none"> <li>Accessioning and ordering NP and BAL's</li> </ul>				
1.4	Trainee has reviewed the location of the <b>worklist</b> they will be responsible for pending on these worklists. Review Respiratory PCR Worklist & Viral PCR worklists, daily.				
1.5	Trainee has reviewed the daily maintenance and clean-up requirements.				
1.6	Trainee has reviewed the Weekly maintenance.				
1.7	Trainee is familiar with the use of the Luminex Aries R® Assay System				
1.8	Trainee is familiar with the proper storage and handling and disposal of sample cassettes.				
1.9	Trainee has reviewed the testing of External controls as detailed in the manual.				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>148</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Evolis EIA Bench</b>					
1.1	The trainee has reviewed safety aspects including: a. The features of a Biosafety Containment 2 Lab. b. Virus Material Safety Data Sheet (MSDS). c. Operation of a Biosafety Cabinet. d. Use of disinfectants and waste disposal.				
1.2	The trainee has reviewed the Serology Procedure Manual relating to the procedures of running Aspergillus Ag EIA testing using the EVOLIS . Trained and performed the following procedures: a. Daily start up procedures b. Preparation and loading of samples c. Preparation and loading of reagents d. Generate and interpret results e. Shutdown procedures f. System Maintenance <ol style="list-style-type: none"> <li>1. Daily</li> <li>2. Weekly</li> <li>3. Monthly</li> </ol> g. Basic Troubleshooting				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>149</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.3	Trainee understands sample O.D. values and index values				
1.4	Trainee is familiar with the following procedures: <ul style="list-style-type: none"> <li>• How to report both negative and positive results</li> <li>• How to report repeated samples</li> <li>• How to report previous positive samples</li> <li>• How to report duplicate orders</li> </ul>				
1.5	Trainee has reviewed the manual method and prepared to handle situations where EVOLIS is not functioning properly or is unavailable.				
1.6	The trainee has reviewed and is familiar with the following procedures: <ul style="list-style-type: none"> <li>• Enter PHOL reports;</li> <li>• Check PHOL pending list</li> <li>• Resolve discrepancies from PHOL reports (ex. Missed tests, wrong tests ordered, patient demographics, etc.)</li> </ul>				
1.7	The trainee has reviewed the Serology Procedure Manual relating to the running of external QC using <i>Virotrols</i> .				
1.8	The trainee understands the donor samples which get frozen and storing process.				
Employee Feedback:					



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>150</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**



I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*

above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Respiratory Pathogen Panel NxTAG™ RT-PCR by Luminex®</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: - Luminex multiplex testing.				
1.3	Trainee is aware of the general precautions related to PCR procedures including: e. The proper use of gloves, gowns, filtered pipette tips and the danger of 150ibonuclease contamination. f. The specific storage and working temperatures for reagents. g. The need to work quickly in the cooling block, keeping the eluates and reagent strips cold during the strip inoculation.				

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>151</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. Internal QC (MS2) b. External QC c. Positive Control d. Negative Control & Non template Control (NTC) –H <sub>2</sub> O				
1.5	Trainee is familiar with the Biorad thermocycler and MagPix operation .				
1.6	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: a) Inoculating Luminex strips b) Operating the Biorad Thermocycler. c) Performing Daily and Weekly maintenance on the MagPix d) Creating Batches (worklist) in Magpix e) Loading the run on the Magpix f) Using the Luminex software in the interpretation and reporting of results				
Employee Feedback:					



**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature* *Date (yyyy-mm-dd)*

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>152</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel		Subject Title: Orientation for Technologists_Technicians	



materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature* *Date (yyyy-mm-dd)*

above signed staff has completed the above training as indicated and competent to perform the bench duties as required.



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>153</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_



**Trainer Name:** \_\_\_\_\_

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Xpert®Xpress SARS-CoV-2 AND Xpert®Xpress SARS-CoV-2/Flu/RSV</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of chemicals or reagents; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: <ul style="list-style-type: none"> <li>• Xpert® xpress SARS-CoV-2</li> <li>• Xpert® Xpress SARS-CoV-2/Flu/RSV</li> </ul>				
1.3	Trainee is aware of the general precautions related to PCR procedures including: <ol style="list-style-type: none"> <li>a. The proper use of gloves, gowns, and the danger of ribonuclease contamination.</li> <li>b. The specific storage and working temperatures for reagents.</li> </ol>				
1.4	Employee always checks that sample has been added to the cartridge before loading in the GeneXpert Dx instrument and is aware that an empty cartridge will give an INVALID or false negative result.				
1.5	Employee is familiar with loading the cartridge in the instrument, unloading from the instrument and proper disposal of used cartridge.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 154 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

1.6	Trainee is aware and showed proficiency in the weekly maintenance of the GeneXpert Dx instrument <ul style="list-style-type: none"> <li>a. Rebooting by shutting down the GeneXpert Dx and computer</li> <li>b. Cleaning the surfaces of the instrument and computer using 70% alcohol.</li> <li>c. Cleaning the cartridge bays and plunger rods of first 1:10 newly made bleach followed by 70% alcohol using lint free wipes.</li> </ul>				
Employee Feedback:					

**The following items apply to technologists only**



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.1	Trainee is familiar with reporting invalid result when all targets are not detected				
1.2	Trainee has reviewed and understand the different possible combination of results: <b>Negative, Positive and Indeterminate</b>				
1.3	Trainee is familiar on what the ct values of an <b>INDETERMINATE</b> result and what the next step is after.				
1.4	Trainee has demonstrated on how to view a positive, negative and indeterminate result on GeneXpert Dx				
Employee Feedback:					

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>155</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>156</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>Seegene ALLPLEX 2019 nCoV Assay</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: - Seegene ALLPLEX 2019 nCoV Assay				
1.3	Trainee is aware of the general precautions related to PCR procedures including: h. The proper use of gloves, gowns, filtered pipette tips and the danger of 156ibonuclease contamination. i. The specific storage and working temperatures for reagents.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. Internal QC (IC) b. External QC c. Positive Control d. Negative Control				
1.5	Trainee is familiar with the HAMILTON Microlab Star and Biorad Thermocycler				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 157 of 177
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

1.6	Trainee has incorporated internal, external, positive and negative QCs and has successfully demonstrated proficiencies in: <ul style="list-style-type: none"> <li>g) Loading reagents consumables and waste basket into Hamilton Microlab Star</li> <li>h) Operating Hamilton Microlab Star</li> <li>i) Operating the Biorad Thermocycler.</li> <li>j) Performing Daily and Weekly maintenance on the MagPix</li> <li>k) Loading the run on the Biorad Thermocycler</li> <li>l) Using the Seegene software in the interpretation and reporting of results.</li> </ul>				
1.7	Trainee is aware that all racks are on the inner deck whenever the racks are not in use. This procedure is to prevent the racks from being damaged.				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.



*Signature* *Date (yyyy-mm-dd)*

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

*Signature* *Date (yyyy-mm-dd)*

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>158</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



<b>ALTOSTAR SARSCoV 2 –COVID 19 PCR testing</b>					
<b>#</b>	<b>Area/Competency</b>	<b>Employee Initials</b>	<b>Date (yyyy-mm-dd)</b>	<b>Trainer Initials</b>	<b>Date (yyyy-mm-dd)</b>
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: - Altostar SARSCoV 2 COVID 19 PCR testing				
1.3	Trainee is aware of the general precautions related to PCR procedures including: j. The proper use of gloves, gowns, filtered pipette tips and the danger of 158ibonuclease contamination. k. The specific storage and working temperatures for reagents.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. Internal QC (IC) b. External QC c. Positive Control d. Negative Control				
1.5	Trainee is familiar with the Altostar AM 16 and Biorad Thermocycler				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>160</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: MGI SP 960SP Instrument BGI Real Time RT-PCR kit for the detection of SARS-CoV-2				
1.3	Trainee is aware of the general precautions related to PCR procedures including: l. The proper use of gloves, gowns, filtered pipette tips and the danger of 160ibonuclease contamination. m. The specific storage and working temperatures for reagents.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. Beta Actin b. External QC c. Positive Control d. Negative Control				
1.5	Trainee is familiar with the MGI SP 960 and Biorad Thermocycler.				



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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\





  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 162 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

### MGI STP 7000 Training Checklist

Employee Name: \_\_\_\_\_

Trainer Name: \_\_\_\_\_

*Print Name*

*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>MGI STP 7000</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: MGI STP 7000 Instrument				
1.3	Trainee is aware of the general precautions related to PCR procedures including: a. The proper use of gloves, gowns, filtered pipette tips and the danger of 162ibonuclease contamination.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations:				
1.5	Trainee is familiar with the MGI STP 7000 software and how to import worklist for the MGI SP loading.				
1.6	Trainee has shown proficiency in choosing the right rack for the different viral transport media.				

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  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>163</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians



1.7	Trainee is aware of the spill protocol and to run the Post Clean after each run				
Employee Feedback:					

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
 materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
 above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>164</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>SARS CoV-2 Variant of Concern (VOC) 501 SNP RT PCR</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: MGI SP 960SP Instrument SARS CoV-2 Variant of Concern 501 SNP RT PCR				
1.3	Trainee is aware of the general precautions related to PCR procedures including: b. The proper use of gloves, gowns, filtered pipette tips and the danger of 164ibonuclease contamination. c. The specific storage and working temperatures for reagents.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. N501Y and S gene b. External QC c. Positive Control d. Negative Control				
1.5	Trainee is familiar with the MGI SP 960 and Biorad Thermocycler.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>166</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
<b>ABBOTT ID NOW COVID-19</b>					
1.1	Trainee is familiar with the general lab safety in the virology lab including the following: Material Safety Data Sheet (MSDS) of viruses; biosafety cabinet; gowns and gloves; disinfection and waste disposal.				
1.2	Trainee has reviewed the procedure manual and is familiar with the principles and procedures of: Abbott ID NOW COVID 19				
1.3	Trainee is aware of the general precautions related to PCR procedures including: a. The proper use of gloves, gowns, and the danger of 166ibonuclease contamination.  b. The specific storage and working temperatures for reagents.				
1.4	Trainee is aware of the Quality Control (QC) Procedures, their implications and their interpretations: a. Positive and negative QC  b. External QC  c. External Positive Control				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>168</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

## MYCOLOGY TRAINING

**Employee Name:** \_\_\_\_\_  
*Print Name*

**Trainer Name:** \_\_\_\_\_  
*Print Name*

**Training Period:** Minimum four weeks

**Mycology Team:** Four to six Technologists

**Purpose:** To demonstrate in direct smear, to isolate and identify yeast, the pathogenic, normal commensal or saprophytic fungi capable of causing mycosis infections as well as to isolate and identify Actinomycetes.

**Safety:** Knowledge of using Laminar Air Flow Safety Cabinet Type 2 and antimicrobial/antifungal agents to be used on surfaces in the mycology laboratory.



#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.1	The employee has reviewed the mycology section of the manual with the trainer.				
1.2	The employee has demonstrated that they can accession new specimens in SoftMic.				
1.3	The employee has demonstrated that they can enter culture comments and result mycology specimens in SoftMic.				
1.4	The employee is aware of what are considered to be critical results.				
1.5	Employee is aware of the correct procedures for handling specimens and fungus cultures. Including the use of safety cabinets and proper disinfection of the bench surfaces, incubators and refrigerators.				
1.6	The employee is familiar with the media used for each specimen type				
1.7	The employee is aware of the purpose of each culture medium used.				

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  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>169</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.8	The employee has demonstrated that they are proficient in the preparation and staining of fungal smears				
1.9	The employee has demonstrated that they can set up a microscope using Kohler illumination.				
1.10	The employee has demonstrated proficiency in reading and interpreting fungal smears using known control material.				
1.11	The employee has demonstrated the proper technique in preparing: a. wet preparations of moulds using scotch tape b. slide cultures c. Fungi-Fluor				
1.12	The employee is familiar with the procedures for setting up, reading and interpreting the following: a. germ tube, b. cornmeal agar c. EBM d. API 20C Aux				
1.13	The employee has demonstrated that they can identify control organisms using procedures outlined in the manual.				
1.14	Employee is aware of the proper protocol for referring specimens and isolates to the Public Health Laboratory (PHL) and histology.				

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>170</b> of <b>177</b>
			Version: 3.18 CURRENT
Section: Personnel	Subject Title: Orientation for Technologists_Technicians		

#	Area/Competency	Employee Initials	Date (yyyy-mm-dd)	Trainer Initials	Date (yyyy-mm-dd)
1.15	The employee is familiar with the procedures for maintaining teaching, stock and control organisms.				
1.16	The employee understand the growth requirements and handling procedures for: <ul style="list-style-type: none"> <li>a. Histoplasma capsulatum and H. duboisii</li> <li>b. Blastomyces dermatitidis</li> <li>c. Coccidioides immitis and Paracoccidioides</li> <li>d. Sporothrix schenckii</li> <li>e. Penicillium marneffeii</li> <li>f. Cryptococcus neoformans</li> </ul>				
1.17	The employee understands the following terms: <ul style="list-style-type: none"> <li>a. Blastoconidia,</li> <li>b. Arthroconidia (contiguous &amp; alternate)</li> <li>c. Macro and Micro conidia, Zygosporangium,</li> <li>d. Basidiospore</li> <li>e. Sporotrichosis,</li> <li>f. Mucormycosis (Zygomycosis)</li> <li>g. Pityriasis</li> <li>h. Actinomycosis</li> <li>i. Prototheca</li> <li>j. Dermatophyte</li> </ul>				
Employee Feedback:					

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page <b>171</b> of <b>177</b>
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

**Employee**

I, \_\_\_\_\_, on \_\_\_\_\_ have read and understood all relevant  
*Signature Date (yyyy-mm-dd)*  
materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required.

**Trainer**

I, \_\_\_\_\_, on \_\_\_\_\_ have reviewed and confirmed that the  
*Signature Date (yyyy-mm-dd)*  
above signed staff has completed the above training as indicated and competent to perform the bench duties as required.

  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 172 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

***Record of Edited Revisions***

**Manual Section Name: Orientation for Technologists and Technicians**

**Employee Name:** \_\_\_\_\_  
*Print Name*



**Trainer Name:** \_\_\_\_\_  
*Print Name*

<b>Page Number / Item</b>	<b>Date of Revision</b>	<b>Signature of Approval</b>
Mycology Bench Checklist added	January 26, 2004	Dr. T. Mazzulli
Quality Control Bench Checklist added	January 26, 2004	Dr. T. Mazzulli
Annual Review	January 26, 2005	Dr. T. Mazzulli
Removed Parasitology Bench Checklist	July 26, 2006	Dr. T. Mazzulli
Annual Review	January 26, 2007	Dr. T. Mazzulli
Updated Planting and Accessioning manual	March 6, 2008	Dr. T. Mazzulli
Annual Review	January 26, 2009	Dr. T. Mazzulli
Annual Review	January 26, 2010	Dr. T. Mazzulli
Annual Review	May 31, 2011	Dr. T. Mazzulli
Annual Review	May 31, 2012	Dr. T. Mazzulli
Revised Infection – added ROCHE & GenXpert PCR	May 31, 2012	Dr. T. Mazzulli
Architect Bench checklist added	May 07, 2013	Dr. T. Mazzulli
Annual review	May 07, 2013	Dr. T. Mazzulli
Serology Accessioning Checklist addition	September 17, 2013	Dr. T. Mazzulli
Added Vitek MS training checklist	November 14, 2013	Dr. T. Mazzulli
Annual Review	September 15, 2014	Dr. T. Mazzulli
Removed Axsym section	September 15, 2014	Dr. T. Mazzulli
Handling of VHF training	September 25, 2014	Dr. T. Mazzulli
Removed Rouge valley references. Added Proper headers/footers logo Updated headers 1 and 2 of t.o.c. , standardized look of all checklists. Updated Week 1 <b>Tour Of Facilities</b> (took off st. Patrick street location, La baguette, Dr. Low’s name) Updated virology accessioning & MPX checklist Archive EBV Behring & HTLV EIA checklist, added to architect checklist Archive WNV IgG & IgM BENCH Added GC/CT training checklist Removed statistics about how many samples/types of samples we process and breakdown of staff in micro	October 24, 2014	Dr. T. Mazzulli

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Quality Manual	Department of Microbiology	Policy # QPEMI03001	Page 173 of 177
	Section: Personnel	Version: 3.18 CURRENT	Subject Title: Orientation for Technologists_Technicians

Page Number / Item	Date of Revision	Signature of Approval
Addition of Technician Virology Accessioning training checklist	January 14, 2015	Dr. T. Mazzulli
Technician Virology Accessioning added 5.8.10, and added Flu A sendout to 5.8.6 Updated "Who we are" section: remove St. Patrick site, Add TRI to TGH, Add clients p.7 Update Information training programs Biorad CFX96 Deep Well ThermoCycler	January 26, 2015	Dr. T. Mazzulli
Updated Orientation for safety with link to safety manual for checklist.	August 24, 2015	Dr. T. Mazzulli
Annual Review p.7 Added details to Quality Management System Training overview Removal of Gen-Probe procedure Updated procedure for training	September 12, 2015	Dr. T. Mazzulli
Added BC checklist to technician training	September 21, 2015	Dr. T. Mazzulli
Added Hospital Orientation Section -Orientation Section: Meeting with safety representative and infection control (p.7) added: "Once the employee has successfully completed the safety and infection control documentation, the laboratory manager or charge technologist will accompany the employee to Security Services to obtain their microbiology laboratory security access pass.	October 20, 2015	Dr. T. Mazzulli
Updated numbering of checklists Added to the end of each checklist: <b>Employee</b> I, _____ (Sign), on _____ (Date) have read and understood all relevant materials and SOPs as pertaining to the above training and have been trained as per checklist and able to assume the bench duties as required. <b>Trainer</b> I, _____ (Sign), on _____ (Date) have reviewed and confirmed that the above signed staff has completed the above training as indicated and competent to perform the bench duties as required.	October 29, 2015	Dr. T. Mazzulli

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page 174 of 177
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



Page Number / Item	Date of Revision	Signature of Approval
Added training checklist for Respiratory Pathogen Panel NxTAG™ RT-PCR by Luminex®	November 6, 2015	Dr. T. Mazzulli
Updated planting and accessioning Infection Control/genital Training checklist. -Added use of WASP and GeneXpert -Added knowledge of Cepheid PCR testing/retesting procedures -Cleaning procedures for PCR Updated Technologist IC section with knowledge of: -BCARBA test -CRE testing procedures -CRE reporting prelim and final phrases	December 22, 2015	Dr. T. Mazzulli
Safety training added: For Non- Laboratory Personnel, See: <a href="#">Microbiology Laboratory Safety Awareness for Non-Laboratory Personnel</a>	January 7, 2015	Dr. T. Mazzulli
Annual Review Updated msh logo in header Virology: Removed rotorgene training, added CMV Roche per training, updated architect training with knowledge of rejection of specimens and donor testing and resulting procedures. Added Senior duties training	July 27, 2016	Dr. T. Mazzulli
Addition of Luminex checklist for respirator testing	August 16, 2016	Dr. T. Mazzulli
Addition of Quality Assurance Technology training checklist. Removed from Mycology training checklist: tease mount, KOH prep, Calcofluor white, oxgall agar, RapID Yeast Plus, histology special staining knowledge, Tinea, Ringworm For Quality Management Training, changed to performed by QA Tech from director.	January 18, 2017	Dr. T. Mazzulli
Blood culture accessioning for technician updated to reflect new Virtuo procedure Blood culture technologist Bench and Virtuo checklists updated to reflect change from BacTAlert to Virtuo	February 23, 2017	Dr. T. Mazzulli
Addition of Virtuo troubleshooting to STAT bench	March 14, 2017	Dr. T. Mazzulli

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>175</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	



Page Number / Item	Date of Revision	Signature of Approval
technologist training		
BC processing and STAT technologist training checklist simplified.	March 23, 2017	Dr. T. Mazzulli
Annual Review Removed Simplexa Training checklist Merged Cepheid Checklists together with addition of enterovirus. Separated MRSA, VRE, ESBL/CRE Separated planting to individual benches. Removed planting references to inoculab.	April 7, 2017	Dr. T. Mazzulli
Six Months competency added to training schedule (page 10).	July 7, 2017	Dr. T. Mazzulli
Aries C.difficile checklist for technicians and technologists added HZ Luminex training checklist added	November 27, 2017	Dr. T. Mazzulli
WASPLab Training checklist added	December 6, 2017	Dr. T. Mazzulli
Cobas 6800 training checklist added Aries flu checklist for technicians added	December 7, 2017	Dr. T. Mazzulli
Added HSV VZV training checklist	January 8, 2018	Dr. T. Mazzulli
Cobas 6800 MLT training checklist updated to include WNV and MPX. TREK MLT training checklist added Paradigm training checklists added for general and expert users.	February 2, 2018	Dr. T. Mazzulli
Annual Review Addition of encephalitis panel by Biofire Filmarray.	February 9, 2018	Dr. T. Mazzulli
Addition of Charge Training Checklist	April 15, 2018	Dr. T. Mazzulli
Technician IMS Training manual added.	August 2, 2018	Dr. T. Mazzulli
Corrected technician Flu by Aries checklist from HZ to Flu test in checklist wording.	October 28, 2018	Dr. T. Mazzulli
Annual Review Addition of Altostar training checklist (virology)	February 25, 2019	Dr. T. Mazzulli
Annual Review Addition of Seegene ALLPLEX 2019 nCoV Assay training Checklist	March 20, 2020	Dr. T. Mazzulli
Added 1.7 to Seegene ALLPLEX 2019 nCoV Assay checklist about handling Racks	April 16, 2020	Dr. T. Mazzulli

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\

  Department of Microbiology Quality Manual	Policy # QPEMI03001	Page <b>176</b> of <b>177</b>
	Version: 3.18 CURRENT	
Section: Personnel	Subject Title: Orientation for Technologists_Technicians	

Page Number / Item	Date of Revision	Signature of Approval
Addition of ARIES® SARSCoV2 PCR testing & ALTOSTAR SARSCoV 2 PCR testing training checklist	May 07, 2020	Dr. T. Mazzulli
Addition of MGI SP 960SP BGI Real Time RT-PCR kit for the detection of SARS-CoV-2 training checklist	August 15, 2020	Dr. T. Mazzulli

**Full document review included in all updates. Bi-annual review conducted when no revision had been made within 2 years.**



Page Number / Item	Date of Revision	Edited by:
Removed Knowledge of BC workflow & sorting midnight pos subculture from Stat bench	October 20, 2020	Dorna Zareianjahromi
Updated Covid training checklists for technicians	2021.01.06	Dorna Zareianjahromi
Add MGI STP7000 training Updated HPV training	Feb 11, 2021	Dorna Zareianjahromi
Addition of Employee Feedback	Feb 11, 2021	Dorna Zareianjahromi
Add Cobas 4800 HPV training, Abbott ID now training, SIBO training	Feb 25, 2021	Dorna Zareianjahromi
Minor formatting change	March 31, 2021	Jessica Bourke
Minor change of responsible person for employee to meet after training on Page 11 (Training schedule)	April 09, 2021	Oliver Li
Updated Luminex Aries ® FLU A/B & RSV Bench and Luminex Aries ® SARS-CoV-2 PCR Testing training checklists by adding the proper loading of Aries magazines	May 18, 2021	Oliver Li
Added training check-list for covid admin, covid accessioning and aliquoting benches	November 1 <sup>st</sup> , 2021	Qin Liu
Added training checklist for Alinity Bench	November 17, 2021	Oliver Li
Minor wording change on Alinity Bench training checklist	November 18, 2021	Oliver Li
Added “The trainee is familiar with how to inspect potential defects of control or reagent cassette” in Alinity bench training checklist	November 30, 2021	Oliver Li
Updated COVID Receptionist training checklist	March 24, 2022	Oliver Li
Updated the date format to yyyy-mm-dd	March 25, 2022	Oliver Li
Updated the training checklist for virology accessioning bench	April 29, 2022	Qin Liu

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Management System\UHN\_Mount Sinai Hospital Microbiology\Quality Manual Policies and Procedures\Personnel\



  Department of Microbiology	Policy # QPEMI03001	Page 177 of 177
	Version: 3.18 CURRENT	
Quality Manual	Subject Title: Orientation for Technologists_Technicians	
Section: Personnel		

Page Number / Item	Date of Revision	Edited by:
<ul style="list-style-type: none"> <li>Deleted the training checklist for Cobas 6800 CMV / WNV / MPX PCR Testing</li> <li>Deleted the training checklist for Roche TaqScreen MPX NAT &amp; WNV NAT Bench</li> <li>Deleted the training checklist for Roche Quantitative CMV PCR</li> <li>Added “Trainee is aware of phoning any NSQ/Not Test results for CMSE.” In the training checklist for mono/vz ab/CMV Immucor tests</li> <li>Added “The trainee is aware of phoning not only significant POSITIVE results but also any NSQ/Invalid/Not Tested result pertaining to donor testing” to the training checklist for Alinity Bench</li> </ul>	July 22, 2022	Qin Liu
Added vitek2 maintenance to MISC planting	Sep 13, 2022	Wayne Chiu
Added Roche cobas® 6800 HPV Bench Training Deleted Roche cobas® 4800 HPV Bench Training	Sept. 28, 2022	Qin Liu
Added the followings to Roche cobas® 6800 HPV Bench Training checklist: <ul style="list-style-type: none"> <li>Trainee is aware of pre-treat temperature for SurePath is 95°C</li> <li>Trainee is familiar with HPV testing workflow.</li> </ul>	Jan 19, 2023	Qin Liu
Added training checklist for Xpert ®Xpress SARS-CoV-2 AND Xpert ®Xpress SARS-CoV-2/Flu/RSV	Jan 24, 2023	Qin Liu
Updated SoftQC & SoftMicQC to SoftTotalQC	March 20, 2023	Oliver Li
Updated Maldi Vitek MS training checklist right before VITEK MS Software update to v3.2	June 11, 2023	Oliver Li
Updated EVOLIS training checklist	June 26, 2023	Qin Liu
Updated cobas 6800 CT/NG training checklist	July 6, 2023	Qin Liu
Updated Luminex Aries ® FLU A/B & RSV training checklist	July 14, 2023	Qin Liu
Added PFGE Training Checklist (pg110-112)	November 1, 2023	Qin Liu

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