

NEW ZEALAND STERILE SERVICES ASSOCIATION

ORIENTATION FOR NEW STAFF

GUIDELINES



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INTRODUCTION

Orientation should familiarise the new employee with the policies and procedures of the work place and give an overview of the department functions and staff duties and responsibilities.

These guidelines are for use with the Sterile Services Orientation Programme that should be given to new employees. The programme contains basic theoretical information and some revision and practical exercises.

These guidelines offer some ideas on the organisation of the practical component of the orientation.

The programme and guidelines have been written to facilitate orientation in a busy Sterile Services department where on the job training is usual.

The new employee's first impressions of the department are important, if they know they are expected and that some planning has gone into their appointment, they are more likely to take an interest and have some expectation of their role.

People find it easier to learn new information and skills when more senses come into play during the learning, and the more they are able to take an active rather than passive part. Sterile Services work is a very practical type of work so some teaching methods will not be suitable.

Suggested Orientation Methods for Sterile Services

- Preceptorship
- Supervision in each area of the department
- Procedure Checklists
- Time allocation in each area of the department

Preceptorship

Also known as the "buddy" system. This system is very successful if the preceptors are highly skilled and motivated.

A preceptor does not necessarily need to be a supervisor or team leader. Preceptorship can be a way of recognising the abilities of a skilled technician.

For this system to be successful, the preceptors must themselves be taught some basics about methods of teaching and the content of the programme. Teaching specified procedures will result in standardised practices and the trainee's progress can be monitored.

Learning is most likely to occur where the following conditions are met:

The Preceptor

- Understands the skills and knowledge to be taught

- Appreciates the present skills and knowledge of the trainee
- Sets reasonable and realistic targets
- Gives feedback on individual performance to trainees
- Emphasises positive achievement
- Uses clear language to give instructions – no jargon
- Provides a positive learning environment which encourages questions
- Uses appropriate correction where necessary

The Learner

- Is reasonably motivated to learn new skills
- Understands and accepts the targets set by the trainer
- Takes an active part in the learning rather than passively accepting instructions
- The expectations of trainees about the work situation are similar to the realities of the situation.

This system can lead to a rapport developing between preceptor and learner that can improve the learning environment. Of course, a personality clash can have the reverse effect and the rostering requirements of the department can create continuity problems.

The quantity of work produced by the preceptor can be expected to fall during the initial orientation.

Supervision in Each Area of the Department

This system has many of the benefits of the preceptorship system. The specified practices can be taught and standards of work observed. The trainee's progress can be monitored so that appropriate experience is gained, i.e.: the trainee is not doing the same job for all of the time spent in one area.

Procedure Checklists

This system may be helpful if used in conjunction with either of the two previous methods, but is haphazard and limiting if used alone as a method of orientation.

Having no specific teacher and just a list of procedures to be learned does not provide support and motivation for the learner. It does not provide feedback for monitoring the standards the trainee has attained. Most procedures are not learnt at the first attempt so checklists can be an unreliable indicator of experience.

Time Allocation in Each Area of the Department

Rostering the learner to areas of the department for set time periods with the expectation that everything will be learnt may not achieve the desired result.

Individual speeds of learning will vary and the time may be too long or too short.

The trainee may only experience limited situations or equipment so assumptions about capabilities after a certain period of time in an area could be wrong.

Decisions about how orientation will be done in each department should be made by each department.

The emphasis during orientation should be on the following:

- Basic techniques and principles that can be used in all areas of the department. Begin with simple tasks and increase the degree of difficulty as skills are gained.
- Support for the trainee from other staff. The trainee is already feeling unsure so criticism will increase feelings of isolation.
- Encourage the trainee to use all documentation and not rely on memory initially. This will improve accuracy and in turn provide positive feedback.
- Quality of work not quantity.
- Encourage the trainee to ask questions.
- Have clear expectations that are understood by all parties and set realistic goals.

TRAINER TIPS

So, you have been invited to train a new staff member. What do I know about teaching someone? I would rather just do my job – let someone else do it.

Why you were chosen

- You have the Sterilising Technology Certificate
- You are a senior member of staff
- You have the skills, knowledge and attitude that we value and we think you will be able to share them successfully

What you will get out of this

- Refresh and challenge your skills and knowledge
- Opportunity for your personal growth
- Give you a chance to gain more skills
- Step towards gaining Merit step.
- Addition to your CV

Training Rules

- Trainee only does basic equipment
- Trainee does repetitive basics
- Trainee does not say when he/she is ready to try something new. The trainer monitors progress and does that.
- Teach systems as well i.e.:
 - from start to finish
 - why it is done like that
 - documentation

Expected Outcome

The Trainee will know

- Hand washing
- Handling instruments

- Collection of used equipment
- Manual cleaning
- Mechanical cleaning
- Wrapping/packaging
- Labelling/batching
- Sterilising
- Operation of all machines
- Sterile goods handling
- Documentation for all areas
- Where to look for help – manuals, information, procedures etc
- How to work methodically – completing batches before starting something else

At the completion of the Orientation period the trainee should be confident to work in any area while understanding that they are not expected to know everything and can still ask for help and guidance.

TEACHING TECHNIQUES

1. Use questioning to find out how much they know or have retained from their previous experience. This draws them into the learning experience.
2. Don't confuse with too much information. Make it relevant to the job in hand, include all steps and documentation. You can give other material for the trainee to read to give more information if you need to.
3. Show techniques etc more than once before expecting them to know it.
4. Ask for questions, encourage questions
5. Never assume. Always ask directly e.g. "Do you know how to do?" "Would you like my help?"
6. Make no assumptions about learning speed. The programme may be too fast or too slow for some learners. They are not expected to conform to our general idea. Remember speed kills – in this case knowledge.
7. Check the trainee's work constantly and discreetly. Do not hang over the trainee but don't assume they are always getting it right because they did once
8. This is not a race – orientation is about basic training in techniques – not learning everything in the set time.
9. Show the trainees how to identify types of instruments e.g. Retractors, Tissue Forceps, Dissecting Forceps
10. Show them how to work the instrument catalogues to help with identifying instruments
11. Teach them to use the tools to help them do the job not just to ask someone when they don't know.

THE START OF EACH AREA

Introduce each area

- Brief description of area
- Where the work comes from
- Staffing
- Where things are
- Documentation
- Forms

Set up the area – restock etc

Plan each day

- Trainee can do all a particular area or specific speciality for that day
- Add 1 or 2 more items if and when appropriate during the week

Throughout the day split the work into yours and theirs. Watch them while you do your own work. Correct them as necessary, explain why, and relate back to previous work. Constantly assess the trainee's skills, knowledge and confidence.

Do not give the trainee more advanced work if there is no basic work. Get a basic procedure/theatre set and set them to learn the instrument names and types. You do the more advanced work. **Remember:** repetition of basics

General Tips

- Don't be fooled by overconfidence and don't be tempted to leave them to it because they appear to know what they are doing.
- Don't tell them everything, ask if they know. Say, "remember in the room we did"
- If you don't know the answer to a question – find out, this is about everyone learning.

Don't expect:

- the same amount of work to be done
- the trainee to learn at super speed
- to be able to cope with every situation, ask the supervisor or manager for help
- It is in everyone's interest to have a reliable, competent colleague – you should try to make that happen.

- Be aware that personality conflicts can happen. You don't have to be great friends with the trainee but you do have to have a professional working relationship. If problems arise, talk them over with the trainee, do not just ignore it.
- Don't allow other people to "take over" the training because they seem to get on better. This is sending mixed messages and is confusing for the trainee. The self-proclaimed trainer may not have the skills.

BASIC TECHNIQUES

Basic Technique Suggestions

1. Hand washing
2. Instrument/equipment handling
3. Collection of used equipment
4. Cleaning techniques
5. Wrapping/packaging
6. Labelling/batching
7. Linen pack preparation – if applicable
8. Sterilising
9. Handling sterile goods

1. Hand washing

Technique:

- Use running water, no plug in basin
- Wash all areas of hands, between fingers
- Clean nails if necessary
- Completely dry

When:

- Before and after meal breaks
- After handling used equipment even if gloves are worn
- Before handling sterile equipment

2. Instrument / Equipment Handling

- Protective clothing
- Alert for sharps
- Opening/dismantling instruments
- Check for cleanliness and working order

3. Collection of Used Equipment

- Protective clothing
- Assemble equipment – trolley, containers etc
- Routes around the hospital
- Times of collection
- Documentation

4. Cleaning Techniques

Manual:

- Protective clothing
- Agents to be used, e.g. detergent, enzyme etc
- Equipment required, e.g. brushes, nozzles etc
- Cleaning procedure and rinsing
- Special techniques, e.g. lumen instruments, tubing, disassembly
- Drying
- Departmental cleaning, e.g. damp dusting

Mechanical:

- Protective clothing
- Selection of suitable machine for equipment to be cleaned
- Correct use of machine
- How to clean machines
- Solution changing
- Procedures in the event of a machine fault

5. Wrapping / Packaging

- Envelope fold
- Parcel fold
- Pouches/reel packaging
- Heat sealing
- Dust covers

DEMONSTRATION OF ASEPTIC OPENING OF PACKAGE

6. Labelling / Batching

- Types of label
- Batching methods
- Documentation
- Information required on labels
- Expiry dating/Event related sterility
- Indicators – steam, ETO, gas plasma, hot air

7. Linen Packs

- Folding techniques
- Checking linen for faults
- Making packs

VISIT TO LINEN PROCESSING FACILITY

8. Sterilising

- Introduction to different types of sterilisers
- Loading principles for each type of steriliser
- Operating each type of machine
- Documentation for each load
- Faulty machine procedures
- Load checking – wet, torn packages, indicator changes
- Steriliser testing – types and frequency of tests

VISIT TO MICROBIOLOGY DEPARTMENT

9. Handling Sterile Goods

- Hand washing repeat
- Techniques – trolleys, avoiding compression etc
- Check for faults, e.g. tears, wet etc
- Expiry date checking
- Stock rotation
- Safe transportation techniques, e.g. inter hospital

LEARNING OBJECTIVES

There are **three types** of learning objectives:

- *Psychomotor* deals with combined mind & body activity, e.g. doing
- *Cognitive* concerned with intellectual processes, e.g. understanding
- *Affective* involves emotions, feelings, attitudes

For the purposes of these guidelines only psychomotor objectives will be discussed.

Psychomotor learning objectives should use verbs that denote actions, e.g. use, clean, operate. Because this type of learning objective focuses on doing, it is easy to evaluate by using direct observation. These types of objectives are suitable for Sterile Services learning where learning involves on the job instruction and very little if any classroom type structured learning.

To clarify the expectations of the teacher and the learner, it is important to state the outcome or desired result fairly precisely.

Example:

Instrument Handling

Objective 1: The learner will handle instruments correctly

What does correctly mean? The teacher's and learner's ideas of correct could be entirely different.

Objective 2: The learner will open and/or dismantle all used instruments and will wear protective clothing while doing this.

The learner will check all processed instruments for cleanliness and working order.

Two objectives have been used here and they state clearly what is expected so that the teacher and learner both know the expected outcome.

Example:

Collection of Used Equipment

Objective 1: The learner will collect all used equipment.

Objective 2: The learner will use a covered trolley to collect all used equipment from all patient areas and will wear appropriate protective clothing while doing this.

Using objective number 2, it is easier to evaluate the trainee's performance by observation.

Example:

Cleaning Used Equipment

Objective 1: The learner will clean all used equipment.

Objective 2: The learner will wear appropriate protective clothing and use the correct agents and equipment to manually clean all surfaces of disassembled instruments.

Example:

Cleaning Used Equipment

Learning Objective

The learner will open and/or dismantle all used instruments and will wear protective clothing while doing this.

Teaching Strategy

Demonstrate use of gloves, aprons, goggles etc. Demonstrate opening and dismantling of instruments. Allow learner to practise.

Evaluation

Observe the learner.

Did the learner meet the objective? E.g., open and dismantle all instruments and wear protective clothing.

Examples of Learning Objectives:

At the completion of the Orientation Programme the new employee will be able to:

1. Demonstrate the correct hand washing technique and state when this technique should be used.
2. Sort, open and dismantle all used instruments and wear appropriate protective clothing while doing this.
3. Collect used equipment from all patient areas using the appropriate clothing and equipment and completing all of the necessary documentation.
4. Demonstrate the correct manual and mechanical cleaning methods for instruments and equipment and wear the appropriate protective clothing.
5. Demonstrate the envelope fold, parcel fold and the use of other packaging materials.
6. Demonstrate all labelling, batching and documentation methods used in the department.
7. Assemble and wrap linen packs.
8. Load and operate all department sterilisers.
9. Demonstrate the correct techniques for checking, handling and transportation of sterile stock.

DOCUMENTATION EXAMPLES

The following templates are examples of documentation that could be used to monitor and evaluate the orientation / training of new staff.

Basic Technique Checklist

Name:

Technique	Teacher	Procedures	Yes	No	Evaluator's Signature and date
Hand washing		Running water			
		Correct Agent			
		All surfaces of hands			
		Clean nails			
		Dry			
Instrument Handling		Protective clothing			
		Alert for sharps			
		All instruments opened			
		All instruments dismantled			
		Instrument check			
		Hand wash			
Collection of Used Equipment		Protective clothing			
		Assembled all equipment			
		Visited all areas			
		Completed documentation			
		Hand wash			
Manual Cleaning		Protective clothing			
		Correct agents			
		Correct tools/equipment			
		Sorting			
		Cleaned all surfaces			
		Rinsed thoroughly			
		Dried completely			
		Hand wash			

Basic Technique Checklist

Name:

Technique	Teacher	Procedures	Yes	No	Evaluator's Signature and date
Mechanical Cleaning		Protective clothing			
		Selection of correct machine			
		Correct use of machine			
		Cleaning of machine			
		Solution changing			
		Fault procedures			
		Hand washing			
Wrapping/ Packaging		Envelope fold			
		Parcel fold			
		Pouches			
		Reels			
		Heat sealing			
		Dust covers			
		Containers			
Labelling/ Batching		Correct labels used			
		Batching methods			
		Documentation			
		Correct information on labels			
		Correct expiry date			
		Correct use of indicators			
Linen Packs		Folding techniques			
		Check for faults in linen			
		Making packs			

Basic Technique Checklist

Name:

Technique	Teacher	Procedures	Yes	No	Evaluator's Signature and date
Sterilising		Correct loading			
		Use of the machine			
		Documentation			
		Fault procedures			
		Load checking			
		Use of tests			
Sterile Goods Handling		Hand washing			
		Correct packet handling			
		Use of trolleys			
		Checking articles			
		Expiry date checks			
		Stock rotation			
		Packing items for transport			

Comments:

Learner:

Evaluator:

Further practise required/requested in:

Orientation Programme: Learner Evaluation

Please help us to improve the quality of our Orientation Programme by completing this questionnaire.

1. Do you feel that this programme met your learning needs? Yes / No
2. Please use the following scale to indicate the effectiveness of parts of the programme.

Rate between 1 and 5 with a circle around the appropriate number,

1 is less helpful through to 5 is more helpful.

Please add comments if applicable.

	Less	Helpful		More	Helpful
Theoretical Programme Content	1	2	3	4	5
Comments:					
Revision and Practical Exercises in Theoretical Programme	1	2	3	4	5
Comments:					
Practical Work Placements	1	2	3	4	5
Comments:					
Teaching Methods for Basic Techniques	1	2	3	4	5
Comments:					

Learner Evaluation *continued*

Are you now able to demonstrate these techniques?

Technique	Yes	Somewhat	Not at all
Hand washing			
Instrument Sorting			
Collection of used equipment			
Manual cleaning			
Mechanical cleaning			
Packaging and wrapping			
Labelling			
Steriliser operation			
Handling sterile stock			

General Comments:

Signature _____

Date _____

Orientation Programme: Teacher Evaluation

1. Did the orientation follow the prescribed programme?

If not, please state reasons.

2. Based upon your observations of the learner's performance, do you feel that this programme met the learning objectives?

Objective	Yes	No
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Comments:

Based upon your observations and evaluations, what changes, if any, do you suggest for the next programme?

Signature _____

Date _____

ORIENTATION TIME FRAME

The length of time required for orientation will vary, some of the factors that will influence it are:

- The ability of the teacher
- Relationship between the teacher and learner
- Rate at which the trainee learns
- Experience gained by the trainee
- Departmental requirements, e.g.
 - number of areas within the department
 - number of basic techniques to be taught
 - rostering requirements
 - unplanned problems, e.g. trainer & trainee separated to cover sick leave
 - trainee may be put in area already learnt

In a perfect world, an uninterrupted period of time for orientation could be set and adhered to. In the real world this is very rarely possible, so it may be useful to set a time period and then review the orientation at the end of this period.

The review should involve evaluation of the programme and the trainee's progress. It is important at this stage to remember that the trainee does not have to know every little detail from all areas; experience can be gained in time.

CONCLUSION

Orientation is an important first step in the process of training any new employee. First impressions in any aspect of life can be long lasting and orientation is no exception. The new employee wants assistance, guidance and instruction to learn new skills and the Manager or Supervisor wants a staff member who can contribute to the output of the department.

An orientation programme that is tailored to your department and is manageable within your resources will help to achieve both of these.

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