GUIDELINES FOR TRAINING PERSONNEL
TO PERFORM INTRAOPERATIVE
BLOOD RECOVERY PROCEDURES

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Guidelines for Training Personnel to Perform Intraoperative Blood Recovery Procedures

Each facility should establish a fully detailed standard operating procedure (SOP) for training personnel to operate cell recovery devices. The following should be included:

- Qualifications for eligibility for training.
- Statement regarding scope of practice.
- Didactic instruction in intraoperative blood recovery (IBR) fundamentals, indications, contraindications (e.g., a contaminated field, potential for dissemination of malignant cells), safe practices, and risks (including fatal air embolism; sepsis; contamination from additives such as topical agents used to reduce bleeding; excessive hemolysis; and infusion to wrong patient).
- The minimum number of IBR procedures to be observed by the trainee for each model of device.
- The minimum number of IBR procedures to be performed by the trainee under direct supervision, for each model of device, and whether training is required for different types of procedures (e.g., vascular, orthopedic).
- Statement of the minimum number of events performed annually required to retain competency without retraining.
- Requirements for annual competency assessment.

The SOP for IBR procedures and the SOP for training must be approved by the blood bank director.

The following documentation of training and competency assessment should be maintained:

- For each employee:
  - Documentation of each training event, specifying model(s) of device used, describing training content, and specifying trainer.
  - Dated record signed/initialed by appropriate supervisor affirming that the trainee was deemed competent upon completion of training. The Director of the IBR Program should have discretion in determining whether a trainee who has met all minimum requirements is deemed competent.
  - Documentation of annual competency assessment which should include a list of skills assessed; and for each, date assessment completed; signature initials of appropriate supervisor; and notation whether performance was satisfactory. It may be helpful to also note the assessment method(s) used.

- A list of employees currently considered competent in performing procedures, specifying model(s) of device for which competency has been demonstrated.