

## ONBOARDINGU: TRAINING FOR TRANSPLANT STAFF™ COURSE CATALOG

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## ABOUT ONBOARDINGU™

This new and innovative e-learning initiative features a library of online training modules intended to supplement your center's new employee orientation program. The Alliance and experts in the field of transplantation have designed *OnboardingU™* to provide all newly hired Transplant staff with a solid foundation of field related information, in order to facilitate success in their new role as well as to promote engagement and employee retention. Each of the modules are fully narrated with interactive puzzles & interactive elements to stimulate learning, and a brief closing assessment to measure retention.

## CONTINUING EDUCATION CREDIT INFORMATION

### **CEPTC Credit**

The Organ Donation and Transplantation Alliance offers 0.5 Category I CEPTC credits from the American Board for Transplant Certification per completed module. Certified clinical transplant and procurement coordinators and certified clinical transplant nurses seeking CEPTC credit must complete the evaluation upon a module's completion.

### **Nursing Credit**

This program has been approved by The Organ Donation and Transplantation Alliance (provider approved by the California Board of Registered Nursing, Provider #17117) for 1.0 Contact Hour per two (2) completed half-hour modules. No partial credits will be awarded. Modules have been pre-paired for credit approval. Nursing certificates will be immediately available for download upon completion of all of the following criteria:

- Both modules have been completed and passed with a score of 80% or higher.
- User's RN license number has been entered into his/her user profile.
- Nursing credit evaluation is complete.

## HISTORY OF TRANSPLANTATION

Duration: 30 Minutes

### Topics Addressed:

- Meaning of transplantation
- Milestones of transplantation
- Testimonials of professional colleagues impacted by organ donation and transplantation

### Objectives

- Identify the significant organ donation and transplantation milestones in history.
- Describe the need for transplantation and the life-changing impact of organ donation and transplantation.
- Identify the act passed by U.S. Congress that addressed the organ donation shortage and improved the organ matching and placement process.

### Where it all began

- 3<sup>rd</sup> century AD – first depiction of transplant

### 1930 – 1960

- First kidney allotransplant
- Advances in immunology
- First kidney transplant
- Immunosuppressants

### 1960 – Present

- First organ donor programs
- Brain death diagnosis
- US National Transplant Network
- New Federal regulations

### Timelines of Achievement

- Achievements in transplantation
  - First human lung transplant
  - Double organ transplant
  - Kidney pancreas transplant
  - First liver, heart and pediatric transplants
  - Multi visceral transplant
  - Vascular composite allografts (VCA)

### Connect to Purpose

- Data about transplant waitlist and how to be a registered organ donor
- Testimonials from colleagues about their desire to work in transplantation

### Assessment/Quiz

- Minimum score of 80% required to pass

## INTRODUCTION TO TRANSPLANT

Duration: 30 Minutes

### Objectives

- Explain the primary phases in solid organ transplant
- Describe the donation and allocation process
- Identify the primary multidisciplinary roles of the transplant team
- Define commonly encountered transplant terms

### Transplant Phases of Care

- Identify patient populations – recipient and living donor
- Pre/Transplant/Post phases
- Living Donor Phases of Care
  - Donor evaluation
  - Donation
  - Discharge

### Donation and Allocation

- Heart transplant listing status
- Lung transplant listing status
- Liver transplant listing status
- Kidney transplant listing status

### Transplant Team Roles

- Transplant team members
- Who makes up the transplant team – required roles and responsibilities

### Transplant Terminology

- Glossary of terms

### Assessment/Quiz

- Minimum score of 80% required to pass

## REGULATIONS, COMPLIANCE AND YOU

Duration: 30 Minutes

### Objectives

- State the two agencies that conduct surveys of organ transplant centers.
- State the frequency of CMS and UNOS surveys for evidence of compliance with established regulations and policies.
- Identify the standard sequence of events for transplant regulatory surveys.
- List the four types of surveys for organ transplant centers
- List the 5 Key elements of an F-QAPI survey.
- Describe typical role specific survey questions that team members may be asked during a survey.
- Identify the CMS/UNOS regulations that stipulate what a transplant program needs to have in place for staff orientation, ongoing staff education and patient education.

### Regulatory Agencies

- HRSA
- CMS
- UNOS
- OPTN
- SRTR

### Oversight Agencies

- CMS and UNOS surveys

### Compliance and Surveys

- Overview
- Entrance conference
- Survey process
- Exit conference
- Report of findings
- Corrective Action Plan

### Survey Preparedness

- Role specific questions
- Things to remember
- Survey protocol/toolkit

### Staff Orientation

- Staff orientation and education structure and processes
- Staff expectations
- Questions to expect
- Staff education – needs assessment and plan

### Patient Education

- Patient education materials for recipients and living donors
- Documentation

### Assessment/Quiz

- Minimum score of 80% required to pass

## DATA ACCURACY AND TIMELINESS

Duration: 30 Minutes

### Objectives

- Identify and discuss regulatory agencies involved in transplant
- State timeliness of wait list addition and removal documentation
- Describe TIEDI® forms and state importance of timely and accurate completion
- List organizations and entities that utilize program-specific data and why

### Key Organizations

- CMS
- UNOS
- OPTN
- SRTR

### Waiting List Documentation

- Notification requirements
- UNOS and CMS comparison of requirements
- UNet™

### Transplant Documentation

- Transplant – first anastomosis
- Deceased donor vessel recovery and transplant use
- Vessel storage and use

### TIEDI® forms

- Explanation
- Completion of forms
- Due dates

### Regulations and Implications

- Contracts and agreement requirements for survey
- HLA testing

### Public Reporting of Data

- Understanding of public reporting
- Examples of data

### Assessment/Quiz

- Minimum score of 80% required to pass

## PATIENT EDUCATION AND COMMUNICATION

Duration: 30 Minutes

### Objectives

- Apply basic principles of adult and pediatric learning to the unique transplant population
- Differentiate the cognitive, behavioral and experiential learning domains
- Identify strategies and tactics to maximize learning with different types/ages of learners

### Realities of Patient Education

- The need for transplant patient education
- Realities of the patient community
- Patient retention

### Principles of Adult Education

- The art and science of learning
- Malcom Knowles: learner-centered education
- Knowles' five assumptions for adult learners
- Characteristics of adult learners

### Applying Principles to Teaching

- Health literacy
- Education design principles
- Enhancing understanding and comprehension
- Preferred learning situations for adults
- Written materials and optimum readability
- Reading level interactive activities
- Sample adult education tools

### Principles of Pediatric Education

- Dependency continuum
- Infants/Toddlers (0 months to 5 years) and teaching strategies
- Middle-agers (6 to 12 years) and teaching strategies
- Adolescents (13 to 19 years) and teaching strategies
- Sample pediatric education tools

### Strategies and Tactics

- Patient autonomy
- Strategic and tactical recaps
- Writing for patient education
- Additional learning tools

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT PHARMACIST 101

Duration: 30 Minutes

### Objectives

- Discuss the roles and responsibilities of a transplant clinical pharmacist
- Identify role-specific transplant resources for clinical pharmacists
- Describe regulatory implications for the transplant clinical pharmacist

### Orientation

- Hospital orientation
- Department specific orientation
- Role specific orientation

### Roles and Responsibilities

- Introduction to role
- “Medication experts”
- Primary role
- Fundamental responsibilities
  - Admission and discharge reconciliation, rounding, research, assessment and management
- Additional responsibilities
  - Cost containment strategies, documentation, optimization of drug administration and delivery, order set development, drug monitoring evaluations
- Pre-transplant evaluation
  - Medication reconciliation, medication adherence, immunization needs
- External education
  - Patients, caregivers, team members
- Internal and peer education
- On call responsibilities

### Pharmacy Resources

- ACCP, ISHLT, ASHP, NKF, AST (links)

### Rules and Regulations

- Regulatory resources – CMS and UNOS
- Pharmacist regulations – CMS and UNOS

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT QUALITY PROFESSIONAL 101

Duration: 30 Minutes

### Objectives

- Define the role of a transplant quality professional
- Describe six main responsibilities of a transplant quality professional
- Identify your hospital's reporting structure and resources available for supporting a transplant quality assurance and performance improvement activities

### Transplant Quality Professional definition

### Six Key Areas

- Survey preparedness
- QAPI
- Patient and staff education
- Communicating regulatory requirements
- Patient safety contact, reporting and follow-up
- QAPI data collection and analysis

### Resource Guide (downloadable)

### Roles and Responsibilities

- Survey preparedness and orientation goals
- QAPI structure and orientation goals
- Patient and staff education and orientation goals
- Communicating regulatory requirements and orientation goals
- Patient safety contact, reporting and follow-up and orientation goals
- QAPI data collection and analysis and orientation goals

### On-Call Responsibilities

### General Orientation

- Hospital partners and departments
- Role matching quiz

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT COORDINATOR 101

Duration: 30 Minutes

### Objectives

- Discuss the roles and responsibilities of a transplant coordinator.
- Identify role-specific resources for the transplant coordinator role.
- Describe regulatory implications for the transplant coordinator.

### The Transplant Coordinator characteristics

#### Orientation

- General overview
- Getting started in your role
- Resources
- Roles and protocols

#### Roles and Responsibilities

- Know what is expected
- Pre-transplant responsibilities
- Post-transplant responsibilities
- On-call responsibilities
- UNet and DonorNet

#### Organ Offers

- UNOS
- 7 step process overview

#### On-Call Responsibilities

- Donor call

#### Resources (links)

#### Assessment/Quiz

- Minimum score of 80% required to pass

## LIVING DONOR COORDINATOR 101

Duration: 30 Minutes

### Objectives

- List which organs are most commonly donated by a living donor
- Identify the five (5) OPTN policies that are most relevant to living organ donation.
- Define the three (3) phases of living organ donation.
- Identify which organs donated by a living donor requires the provision of an Independent Living Donor Advocate (ILDA).
- Identify the key elements required for informed consent for living organ donation.
- Identify which UNet applications are used to document and submit living organ donor required forms.

### Basics of Living Donation

- Eligible organs for living donation
- History of living organ donation
- Types of living donor transplants

### OPTN Policies Relevant to Living Donation

- Policy 1
- Policy 13
- Policy 14
- Policy 15
- Policy 18

### Phases of Living Donation

- Pre-Donation Phase
  - Key elements
- Donation/Perioperative Phase
  - Key elements
- Post-Donation Phase
  - Key elements

### QAPI Considerations

- Dashboard metrics & events reporting
- UNet TIEDI documentation and submission requirements

### Resources (links)

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT PROCUREMENT COORDINATOR 101

Duration: 30 Minutes

### Objectives

- Describe the role of the Transplant Procurement Coordinator (TPC)
- Discuss general and specific onboarding items for the Transplant Procurement Coordinator position
- Explore the potential role responsibilities of a Transplant Procurement Coordinator, including on-call responsibilities
- Identify role specific resources for the Transplant Procurement Coordinator
- Describe rules and regulatory requirements that apply to the Transplant Procurement Coordinator role

### The TPC Role

- How the role was developed
- Purpose of the role

### A Day in the Life

- Communication
- Record maintenance
- Patient management
- Logistics

### Aspects of the Role/ Well Rounded Role

- Specialized role responsibilities
- Key stakeholders

### Orientation

- General orientation items
- Role specific items
- OR responsibilities

### On-call Responsibilities

- Hospital/Donor/Recipient

### Additional Tasks

- Potential responsibilities

### Role Specific Resources

- Reading materials (links)
- Orientation resources

### Rules and Regulations

- TPC rules and regulations
- Relevant websites
- The Alliance resources

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT SOCIAL WORKER 101

Duration: 30 Minutes

### Objectives

- To provide an overview of the role of the solid organ transplant social worker as a member within the multidisciplinary transplant team
- To educate the solid organ transplant social worker on role specific rules and regulations as determined by the Center for Medicare and Medicaid Services (CMS)
- To provide information on both professional and patient resources related to solid organ transplant and living donation

### General Orientation Items

- Hospital and Department

### Role Specific Orientation Items

### Suggested Reading Materials

### CMS Regulation

### Roles and Responsibilities

- Evaluate patients
- Follow patients
- Provide professional services/clinical expertise

### On Call Responsibilities

### Phases of Care for Transplant

- Pre/Transplant/Post phases

### Pre-Transplant Phase

- Psychosocial Evaluation: Key components
  - Social History
  - Financial Impact
  - Medical History and Compliance
  - Psychiatric History
  - Spirituality and Coping
- Completing the Evaluation

### Transplant Phase

- Discharge planning
- Referrals

### Post-Transplant Phase

- Insurance navigation
- Adjustment to transplant

### Living Donors

- Living donor evaluations

- Living donor considerations

Resources:

- Professional and patient

Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT FINANCIAL COORDINATOR 101

Duration: 30 Minutes

### Objectives

- Identify and discuss specific responsibilities of the Transplant Financial Coordinator.
- Identify basic work flows of the position.
- Discuss the processes in determining patient-specific coverage.
- Discuss case set-up and obtaining approvals from health plans and medical groups.

### A Day in the Life

- Admissions, discharges and transfers
- Case management
- Counseling
- Referrals and evaluations

### Orientation

- General orientation
- Department orientation
- Transplant Financial Coordinators Association (TFCA)
- Orientation overview/checklist - samples

### Roles and Responsibilities

- Next steps
- Benefit verification
  - Plan verification and notification
- Re-verifying/updating benefits
- Pre-certification and Authorization
- Case initiation examples
- Living donor coverage for recipients
  - Commercial insurance, Medicare, Medicaid, kidney paired donation
- On call responsibilities

### Importance of Prioritization

- Referrals, evaluations and urgent transplant cases
- Division of responsibilities

### Associated Expenses

- Hidden or forgotten costs
  - Non-medical: travel, meals, lodging, phone, child/pet care, lost wages
- Other expenses
  - Insurance premiums, non-covered medical expenses

### Rules and Regulations

- UNOS by-law requirement/information

### Assessment/Quiz

- Minimum score of 80% required to pass

## TRANSPLANT ADMINISTRATOR 101 – PART 1

Duration: 30 Minutes

### Objectives

- Discuss the roles and responsibilities of the Transplant Administrator
- Identify key resources for a Transplant Administrator
- Describe regulatory roles and responsibilities for the Talent Administrator

### Orientation

- Table of Organization
- Transplant Center Background
- Getting Acquainted
- Identifying Critical Partners

### Key Roles & Responsibilities

- Key Roles Overview
- Regulatory and Financial responsibilities
- OPO and OPTN Relations
- Meetings, Meetings, Meetings
- Daily Operations

### Quality Responsibilities

- Quality Orientation
- Adverse Events
- Regulatory Site Visits
- Risk Management and Safety
- Data Management and Regulatory Reporting

### Fiscal Responsibilities

- Fiscal Responsibility Overview
- Time Studies
- Medicare Cost Reports
- Administrators MCR Role
- Standard Acquisition Cost (SAC) Fees
- Living Donor SAC Fees
- OPO SAC Fees
- Managed Care Contracts

### Assessment/Quiz

- Minimum score of 80% required to pass