For inspectors, a new and better training course

Valerie Neff Newitt

May 2022—Users of the CAP's redesigned laboratory inspector training course, introduced last December, should find it to be more fun, less chore, and tailored to what they need to know, say those who developed the new course. And it's open and accessible to all.

The format of the course, known as adaptive learning, makes it possible for users to bypass what they know and zero in on what they don't.

"In my experience in different university settings, I hadn't had the opportunity to work with adaptive learning or this type of software before we unveiled it. My guess is it will be new for a lot of people," says Ericka Olgaard, DO, MBA, chair of the CAP Accreditation Education Committee, whose members helped create the new course. Committee members did an analysis to find the gaps in training, she says. "In the spirit of continuous improvement, we are always looking to identify things we need to change, add, modify, subtract—to make it better, based on real-life experience in the lab. We think this course really is better."

Julie Donovan, MT(ASCP), CAP instructional designer and co-developer of the course, defines adaptive learning as "a customized learning experience" personalized to the needs of each trainee. Because the course is tailored to each learner's needs and their own experience or inexperience, says Dr. Olgaard, clinical associate professor, Department of Pathology, Immunology, and Laboratory Medicine, University of Florida College of Medicine, "it helps each learner identify deficits they have personally and helps them grow and learn more."

At the outset, the new course assesses a user's existing knowledge through a series of targeted questions. "They are not particularly taxing questions," Donovan says, "but also they are not just one and done. The questions assess an entire topic area, and if you get all of the questions correct, then the course will allow you to skip that section of training. In the end, it will prescribe a unique learning path for each user. So if you and I both took this course, we'd have completely different pathways to completion."

Olgaard

The prior training course was similar to "a day in the life of an inspector," says Jeff McNeal, MEd, CAP director of education program design and co-developer. "It was a sequential, linear course that followed a storyline. Users had to take each page and module in sequence for that story to make sense. But with adaptive learning, you can test out of some sections, and that would have resulted in a disrupted story. So we removed the story element." Now the course consists of concise, bite-sized content that can stand alone and does not depend on the section before it. "All of the necessary information in the original course remains," he says.

The training offers versions for inspection team members and inspection leaders. If the user were to go from start to end, without skipping any part of the course, the training time would be 4.5 hours for team members and five hours for team leaders.

The content is divided into three main sections: before, during, and after an inspection. People training to be team members will receive operational information, as well as "theory of the inspection and directions on how to inspect," Dr. Olgaard says. They will also receive salient points around the all common checklist and the laboratory

general checklist. "The course gives objectives and directives on specifics—papers you need to fill out, what needs to be signed, what needs to be sent and where." Discipline-specific sections give users guidance in determining compliance in each discipline they would inspect on their next inspection.

The team leader training has about 30 minutes of additional content, Donovan says, "related to assembling and managing the team, selecting the right people, setting up the inspection date with the lab to be inspected, understanding how to get travel booked, evaluating the lab director with a special checklist, completing a special summary report, and more."

"It's really about leadership," Dr. Olgaard says. "It covers planning, making assignments, prepping the team. It's about organizing the entire process for team members, communicating with them, facilitating their interactions with others, dealing with difficult situations, and conflict resolution. It also instructs on how to wrap up the inspection and associated responsibilities such as getting all the information and paperwork to the CAP."

At the end of the previous training course, there was a test that users passed or failed depending on a percentage of correct answers. Now, there is no test at the end. Instead, the course tests knowledge throughout the training, in each of the sections. "It doesn't let you fail," Dr. Olgaard says. "It assesses your knowledge throughout your learning path, and you move on only once you've mastered or tested out of a particular topic."

Some ancillary inspection content is presented in informational add-ons that are linked to the primary course. For example, virtual inspections that became common during the pandemic are discussed in a section linked to the training course. "We made it a separate course because it wouldn't pertain to everyone," Dr. Olgaard says. "However, those doing virtual inspections would still need to complete the full inspector training course."

A new feature of the course is its ability to track what a user has completed and what still needs to be done. "It keeps track of which modules were visited, whether they were completed successfully, or whether they were failed and required retaking," McNeal says.

The training course also returns users to the point at which they stopped the last time they were active. "It's like a living course," Donovan says. "It remembers you took it, even years later. If the content hasn't changed, it will mark you as having completed the sections. However, if the content has changed, it will flag you and let you know there is additional material to learn and digest." That push notification will also tell users exactly where to find the new content.

While the course is intended for inspector trainees, Dr. Olgaard says it would benefit anyone who works in a laboratory. "It certainly would behoove a lab director awaiting an inspection to know what inspectors will be looking for. And it is not infrequent that someone will take the course even if they do not have an inspection pending or are planning to be an inspector," she says. "When residents rotate through our lab, we have them take the training. Some people may take it for the CME credits"—five for leaders, 4.5 for team members. "It's open and accessible to everyone and there's not a bad time to take it."

Should inspectors re-train after a prolonged hiatus from inspecting? "It used to be a requirement that inspectors be trained every two years, but that requirement has not been retained. However," Dr. Olgaard says, "I think everyone should refresh themselves before they do their next inspection, especially if they haven't used this new platform."

The new course, presented in sections, is mobile, McNeal says, and easily accessible via computer, laptop, tablet, or phone. "This allows users to complete the training at their convenience. Mobility also means an inspector can bookmark a page or a handy reference list and open it at the inspection site. Mobility is one of the improvements that makes the entire experience more user-friendly."

"This training course contains information that every single one of our laboratories needs to know," Dr. Olgaard says. "It offers high-yield information that is incredibly applicable. You and your colleagues will be using the information you get in the training modules for years to come. That's a fact."

Valerie Neff Newitt is a writer in Audubon, Pa.