





# Core Elements of Sterile Processing Training Programs

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Certified Instrument Specialist (CIS) lessons provide members with ongoing education in the complex and ever-changing area of surgical instrument care and handling. These lessons are designed for CIS technicians, but can be of value to any CRCST technician who works with surgical instrumentation.

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## LEARNING OBJECTIVES

1. Discuss educational requirements for a Sterile Processing department and its technicians, including new hires and more experienced instrumentation specialists
2. Review the steps needed to introduce new medical devices or processes into the department
3. Discuss the continuing education obligations of a Sterile Processing technician and review documentation requirements for education provided

**E**very Sterile Processing department (SPD) requires a training plan—a written description of the structure of its education program with a sequence of lessons. The plan should include comprehensive training for employees that addresses all job tasks they must be skilled in performing, as well as a model for single topics such as safety in Sterile Processing (SP). Training plans describe the skills and knowledge that trainees require at the completion of the training and outline what must be done (activities accomplished and knowledge gained) for the training to be successful. Training must be ongoing. All SP technicians, from new hires to more experienced employees, such as certified instrumentation specialists, need to be competent in their activities and stay up to date on current trends and processes.

## Objective 1: Discuss educational requirements for a Sterile Processing department and its technicians, including new hires and more experienced instrumentation specialists

SP education begins when a new technician is hired. Typically, it has three components: onboarding, orientation and training. The onboarding process should be designed to welcome employees to their new work environment. Orientation gives “general information about a healthcare facility that must be known by all employees in all departments.”<sup>1</sup> Training provides the information, tools and resources required to learn and perform job responsibilities.

Onboarding aims to build a connection between a new employee



and their department. It can include a phone call in advance of the employee's start date to explain first-day activities; regularly scheduled meetings to establish expectations, answer questions and provide feedback; and opportunities to discuss the employee's aspirations and professional development plans.<sup>1</sup>

Orientation "introduces new employees to job duties, co-workers, the work environment and the overall healthcare facility. It includes information about policies, procedures, work rules, job tasks and the workplace." Orientation is not job specific and often the responsibility of the Human Resources department. This process must be documented. An orientation checklist can be used to identify the topics to be covered and guide the introduction. After each topic is presented, both the trainer and trainee should check off the topic, showing it has been completed: "This is particularly important if the orientation is conducted by more than one preceptor (trainer) or mentor. The completed checklist should be signed by the employee and his/her trainer(s) and a copy placed in the employee's permanent file." Once completed, the checklist serves as a record of the information provided to the new employee.<sup>1</sup>

Training is designed to develop "the knowledge, skills and attitudes necessary for staff members to perform required job tasks." It involves learning and practicing technical tasks as well as acclimating to the department's culture. New employees will encounter both formal and informal training opportunities. Formal training is defined as "an official and well-documented technical process that provides employees with specific information about procedures, protocols and job tasks." This is required in all SPDs. Informal training communicates behaviors and attitudes about how the

department actually runs. It most often "occurs when policies and procedures are not followed" or when co-workers complain about a specific aspect of their job or another person on the team.<sup>1</sup>

Each training should incorporate different types of material and accommodate a variety of learning styles. A lesson, for example, "may incorporate discussions, a video, role play and review test. The training tactics selected should be those that will best help the trainee gain the knowledge and skills required to successfully perform the given task(s)."<sup>1</sup>

After the new technician has completed their training, a competency review is performed to demonstrate that they have achieved the skills and knowledge to perform the tasks of their job. SP processes must be performed with consistency, every day, every shift, every time. Competency measurements provide employees with feedback on their performance and identify areas where improvements can be made. They serve as a verification of adequate training and employee understanding of job requirements or as a tool to identify the skill level of employees who come to the facility with previous experience. Competencies must be documented. Some competencies are required to comply with federal regulations or accreditation agencies; others serve as documentation of skills and knowledge.

There are several methods of competency testing that can be used, including a demonstration of the task being performed, a written assessment, and an announced or unannounced observation. Trainers may also conduct an interview to assess the new technician's grasp of what to do in a situation not easily duplicated, such as a sterilizer recall, or stage a group assessment to evaluate how the team works together in response to simulated

challenge like an instrument turnaround or loss of power to the SPD.<sup>1</sup>

Training is not just for new employees, and many different types of training can be used in SP. Short "curbside" inservices are generally offered in or near the work area to allow staff members to attend and review the information as time allows during their shift. For example, a curbside inservice may highlight a new medical device. A knowledgeable trainer should be available to provide demonstrations and answer questions.

Formal inservice training is designed to enhance existing skills or teach new ones. These programs may be delivered as classes in meeting rooms or hands-on sessions in SP work areas. Inservice training can also be scheduled on a shorter timeline to address immediate concerns, such as the introduction of new instrumentation or addressing a specific customer complaint. Inservice training is often eligible for continuing education (CE) credits used to maintain certification.

Mandatory inservice training and staff education must be documented annually. Examples include fire preparedness and bloodborne pathogen safety. Facilities using ethylene oxide (EO) sterilization systems must conduct annual EO safety training. *Note: Most facilities have specific requirements for annual training sessions. State and local government agencies also issue regulations about which staff updates are mandatory. Staff education may exceed but cannot fall below the minimum requirement.*

## **Objective 2: Review the steps needed to introduce new medical devices or processes into the department**

One of the exciting aspects of working in an SPD is seeing the new medical devices that come into the facility. These



devices are designed to improve patient care and are often highly complex. Processing equipment and techniques are also updated based on revisions to standards, guidelines and regulations.

A selection committee is often convened to review new medical devices or equipment before it is introduced to the healthcare facility, and an SP representative should be included. As a member of the committee, the SP representative should review the product manufacturer's instructions for use (IFU) to evaluate if the SPD has the equipment, time and expertise to process the product. SP staff education should be a consideration of the purchasing decision, and the medical device manufacturer should provide educational resources for the SP team. This is particularly true when new medical devices and equipment are introduced into the healthcare facility that will be processed in the SPD. The SP staff should receive inservice training on the proper cleaning, inspection and sterilization methods. For complex items, each SP technician should perform a return demonstration and have competency documented.

Manufacturers can supply many types of training materials beyond an IFU document. Providing an onsite educator is the most effective means of training staff since the educator can make their presentation, observe the processing environment, clarify misunderstandings, and answer questions. Other resources that may be available include an education checklist that explains the processing steps and may be used for return demonstrations. Training videos or webinars may be available on the manufacturer's website. Some may provide a certificate of attendance that can be used for certification CE credits. Posters showing the detailed processing

steps may also be available and can be especially helpful when implementing new processes.

### **Objective 3: Discuss the continuing education obligations of a Sterile Processing technician and review documentation requirements for education provided**

SP technicians often want to learn more about processing a specific item or improving a process. Certified SP technicians require maintaining a specific number of CE credits. Individual learning programs are available to fulfill this requirement. Lesson plans, like this one, are also available. They cover a variety of topics associated with healthcare medical device processing, including decontamination, sterilization, packaging and storage.

Online education, such as webinars, videos and podcasts, can provide exceptional educational material. These programs allow anyone in any location to access education. While these resources may offer valuable education, it is critical to be aware of misinformation and confirm that the content is accurate and supplied by a reputable source. Government agencies are trustworthy sources. Medical device manufacturers provide accurate information regarding their specific products. Reviewed education programs are offered through professional associations including HSPA, the Association for the Advancement of Medical Instrumentation (AAMI), the Association of periOperative Registered Nurses (AORN), and the Association for Professionals in Infection Control and Epidemiology (APIC). When looking online for educational opportunities, confirm the offering is current to

standards, regulations and best practices.

Vigilance should be used when checking social media for medical device processing education. Social media is used for many purposes, most typically for entertainment, social interaction, networking, support and information sharing. If the information is not reviewed by a credible source for accuracy, it is not recommended for educational purposes.

Local, regional and national conferences on SP topics provide education as well as opportunities to network with other SP professionals. These conferences typically offer educational programs on the most up-to-date SP topics. Attending conferences can also help develop a sense of pride and appreciation for learning among SP staff.

It is the responsibility of the department leader to maintain a record of all educational programs provided to the department. This includes all phases of education—onboarding, orientation, training, competencies, required education and continuing education. In addition, a record of every educational program attended by each employee must be kept on file. For each departmental inservice, documentation should include the program title, presenter(s), objective(s), date, length of time, and names of the attendees. If a follow-up assignment is required, completion of that task should be recorded as well.

It is the certified technician's responsibility to maintain, document and submit their CE credits to their certifying body. Maintaining certification is required in select states and at some healthcare facilities. Some departmental inservices can be submitted for CE credit to some certifying organizations. Maintaining SP certification helps keep technicians



current with the frequent advances in SP standards and guidelines as well as new medical devices and processes. The certification renewal process typically consists of submitting CE credits and an annual renewal processing fee to the certifying body.

### Conclusion

Sterile Processing is a dynamic, ever-changing environment. The medical devices used to improve and save lives are changing at a rapid pace, and medical device processing technology is also constantly advancing. New medical devices are increasingly complex and require a higher level

of skill to be effectively processed. Combining that with the revisions to standards, guidelines and regulations, the importance of continuing education is clear. As technicians learn, their skills improve and their knowledge base deepens, which can position them for advancement and, most importantly, maintain the necessary abilities to successfully process medical devices for safe patient care. **P**

### REFERENCE

1. International Association of Healthcare Central Service Materiel Management (IAHCSMM/HSPA). *Central Service Leadership Manual*. pp. 61–66. 2020.





# CIS Self-Study Lesson Plan Quiz

## Core Elements of Sterile Processing Training Programs

Lesson No. CIS 299 (Instrument Continuing Education – ICE) · Lesson expires October 2026

- Which best describes a Sterile Processing (SP) training plan?
  - It improves the sterilization process
  - It addresses all job tasks that a newly hired employee must be skilled in performing
  - It identifies problems to prevent them from reoccurring
  - It focuses on the cleaning process
- What is the purpose of an orientation program?
  - To prove a technician is trained and proficient in a certain activity
  - To address a problem area
  - To provide general information about the facility that must be known by all employees
  - To teach technicians how to operate new equipment
- A competency review:
  - Demonstrates that an employee has achieved the skills and knowledge to perform the job task
  - Develops a safe teamwork environment that is verified by the facility's Risk Management department
  - Maintains a technician's continuing education (CE) credits
  - Documents that the job task was shown to the employee
- Which of the following competency testing methods should **not** be used in SP?
  - Demonstration
  - Peer review
  - Written assessment
  - Unannounced observation
- A trainer has a technician perform a task during which type of competency testing?
  - Demonstration
  - Peer review
  - Written assessment
  - Unannounced observation
- When does training end?
  - At the conclusion of onboarding
  - After the problem is resolved
  - After the employee has worked in the department for one year
  - Training should be ongoing
- Training is necessary:
  - Whenever a new medical device is introduced
  - Whenever new processing equipment is added
  - Whenever sterilization standards, guidelines and regulations are updated
  - All the above
- When a new instrument is introduced to the Sterile Processing department, how should it be introduced or provided?
  - By contacting someone who currently uses the new instrument
  - By attending an inservice about the proper cleaning, inspection and sterilization methods
  - By checking the U.S. Food and Drug Administration's 510(k) clearance documents
  - By asking Surgery staff how they would like the device to be processed
- Local, regional and national conferences are inappropriate sources for SP education because the information they provide is often not current.
  - True
  - False
- How does an SP technician know that educational material accessed online is accurate?
  - By verifying the organization providing the educational material
  - By asking a fellow SP technician
  - By checking social media and reading replies
  - All the above
- Social media is an appropriate and effective way for professionals to obtain education.
  - True
  - False
- Which is a benefit of attending an SP conference?
  - It helps attendees prepare for certification
  - It provides a healthy distraction from work
  - Attendees can validate their teammates' competencies upon returning from the conference
  - Attendees gain access to the current and up-to-date educational sessions and can improve their professional networking
- Records do **not** need to be maintained for which of the following?
  - Social media posts
  - Orientation
  - Competency review
  - Continuing education
- Who is responsible for maintaining, documenting and submitting a certified technician's CE credits to their certifying body?
  - The SP manager
  - The SP educator
  - The certified technician
  - The Human Resources manager
- Why is it important to provide educational offerings to SP technicians?
  - Because most new-hire orientation is ineffective
  - Because SP educators are required to deliver bi-monthly education to all staff members
  - Because instructions for use (IFU) require interpretation from SP managers, educators or certified instrumentation specialists
  - Because new medical devices are increasingly complex and require a higher level of skill to be effectively processed

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