



## County Health Department Laboratory Procedures

Title: Training Policy for Vaginal Wet Preparation PPM

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Version: 1.3

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Date Time Of Last Update: 22-Apr-2014 12:27

Next Review Due On: 22-Apr-2015

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## Training for Vaginal Wet Preparation Provider Performed Microscopy (PPM)

Appropriate training must be completed by all individuals who will perform vaginal saline and KOH wet prep PPM testing at OSDH County Health Department sites. PPM may only be performed by a suitably credentialed physician, dentist or midlevel practitioner (e.g., physician's assistant, nurse practitioner). The *Vaginal Wet Prep Procedure: Training and Competency Assessment Form*, found at the end of this policy, should be used to document all wet prep training. The form must be submitted promptly to the Field Laboratory Operations Section of the OSDH Public Health Laboratory subsequent to training for filing.

**The trainee** must complete each of the following items before he/she can be deemed competent in *independently* performing saline and KOH wet prep procedures.

1. Be appropriately trained in the collection, processing, and examination of vaginal samples for critical indicators of infection and in the procedures for recording of results while under the *direct supervision* of an individual who has been deemed competent to provide training.\*
2. Read and understand the vaginal saline and KOH wet prep protocols.
3. Provide a copy of college transcripts/degree and license/registration to be kept on-file at the OSDH central office.
4. Successfully complete a written test covering laboratory practices AND successfully read a set of slides of typical wet prep images; administered by OSDH Public Health Laboratory (a score of 80% or better is required to pass).

Once the trainee is deemed capable of *independently* collecting vaginal samples and preparing and reading saline and KOH wet prep slides by the trainer, the trainee will be required to participate in periodic assessments of competency, including:

- *Direct observation* and documentation of successfully performing all steps of saline and KOH wet prep procedures by a suitably trained individual\*, prior to 6-months from completion of initial training AND yearly thereafter.
- *Proficiency challenges* periodically scheduled by the OSDH Public Health Laboratory.

Individuals who are unable to demonstrate competency after initial training will be provided with additional training materials and assessments of competency.

Documentation of the initial written test(s), 6-month evaluation, all subsequent proficiency challenges, and college transcripts/degree and license/registration must be kept at the OSDH central office.

**The trainer** must be a *competent individual\** who:

- has been trained in wet prep procedures
- has performed wet prep testing on a regular basis for greater than 1 year
- has successfully completed the most recent wet prep proficiency challenge administered by OSDH Public Health Laboratory (i.e., scored  $\geq 80\%$ ).

The trainer should provide closely supervised training in the collection, processing, and examination of vaginal samples for critical indicators of infection and in the recording of test results. Following successful training, the trainer and trainee must sign an attestation statement (*Training and Competency Assessment Checklist*) indicating that the trainee has been appropriately trained to work independently in the collection of vaginal samples from patients, in processing those samples for saline and KOH wet

slide preparation, in microscopic examination of the slides for critical indicators of infection and in documentation of results. The attestation statement also attests that the trainee has provided the appropriate documentation (college transcripts/degree and license/registration) and that the documentation is kept on file at the OSDH central office. This attestation form must be forwarded to the OSDH Public Health Laboratory.

The trainer should periodically observe the work (procedures and documentation) of the trainee directly following successful completion of training to make sure all components of wet prep testing are being performed accurately.

The same trainer or alternative trainer may be involved in any remedial training that is required.

**Training physicians** (including residents or fellows) who will perform vaginal saline and KOH wet prep PPM testing at OSDH County Health Department sites have two options for training prior to performing PPM:

- Residents/fellows may be ***directly supervised by a physician OR Advanced Registered Nurse Practitioner (ARNP)*** while performing PPM. Residents/fellows must be appropriately trained in specimen collection, preparation and reading of wet prep slides by an individual deemed competent in wet prep testing (as defined above). The extent of this training would be at the discretion of the supervising physician or ARNP. An individual deemed competent in wet prep testing (supervising physician or ARNP) must also read all wet preps performed by the resident/fellow in a timely fashion such that there is no potential for compromise of diagnosis. The resident/fellow must provide a copy of college transcripts/degree and license to be kept on-file at the OSDH central office.
- 5. Residents/fellows may be appropriately ***trained to perform PPM procedures independently***, including specimen collection, preparation and reading of wet prep slides, such that they can be deemed competent. Training must be provided by an individual deemed competent in wet prep testing (as defined above)\*. The components of this training are the same as for any new trainee who would eventually perform PPM independently and are detailed above. Assessment of competency of the resident must be documented by completion of an attestation of training form (by an individual deemed competent in wet prep testing\*) and successful completion of a written test covering laboratory practices AND successful reading of a set of slides of typical wet prep images by the resident; the latter to be administered by OSDH Public Health Laboratory (a score of 80% or better is required to pass). This training and assessment of the resident must be completed before the resident is allowed to perform PPM on patients independently. If the resident/fellow is trained to perform PPM procedures independently and a proficiency test (PT) challenge is issued to the site where the resident/fellow is located, the resident/fellow must complete the PT challenge.

Materials provided by the OSDH Public Health Laboratory will include:

- PowerPoint Wet Prep training presentation
- Trainer Attestation Form
- Initial training written test
- Initial training challenge of typical wet prep images (PowerPoint)
- Periodic proficiency challenges (at least twice per year)

**Remedial Training**

Note that at any time a problem is identified in the ability of a PPM analyst to perform wet prep testing, remedial training may be implemented as a means to resolve the problem. The Public Health Laboratory and/or Nursing Services may also require the individual to stop testing until they have successfully completed remedial training.

***Sub-optimal Performance During Initial Training***

A trainee who performs sub-optimally during initial training may receive additional training on-site from the same or different trainer or from an individual from the Oklahoma State Department of Health (OSDH) central office. The trainee will be assessed for competency in all aspects of performing the wet prep procedure and will be required to successfully complete a written test covering laboratory practices AND successfully read a set of slides of typical wet prep images, administered by OSDH Public Health Laboratory (a score of 80% or better is required to pass), prior to being allowed to perform the wet prep procedure independently for clinical purposes.

***Suboptimal Performance Within One Year Of Initial Training***

A PPM analyst who performs sub-optimally subsequent to initial training will be required to undergo remedial training provided by an on-site trainer or by an individual from the OSDH central office, either on-site or remotely by telephone or other electronic method. Remedial training will be structured to address the apparent deficiency of the analyst and may involve directed or a more broad scope training, at the discretion of the District Nurse Manager or Director of the OSDH Public Health Laboratory.

***Sub-optimal Performance On A Single Proficiency Challenge (i.e., Unsatisfactory PT Performance)***

PPM analysts who fail to attain a satisfactory score (80% or better) on a single wet prep PT challenge (deemed “unsatisfactory PT performance”) subsequent to initial training are required to initiate a corrective action plan. The following steps must be taken:

1. Determine and document the reason for the error on a Corrective Action Form.
2. Have an individual from the OSDH central office review the PT challenge slides with the analyst; this usually can be accomplished by telephone communication.

Analysts with an unsatisfactory PT performance may continue to perform wet prep testing while addressing the action plan.

***Sub-optimal Performance In Two Consecutive Or Two Of Three Consecutive Proficiency Challenges (i.e., Unsuccessful PT Performance)***

PPM analysts who fail to attain a satisfactory score (80% or better) in two consecutive or two of three consecutive wet prep PT challenges are required to cease wet prep testing immediately. The analyst will undergo remedial training by an individual from another County Health Department or from the OSDH central office who is competent in performing wet preps. This may occur at the analyst’s site or an alternative location. The analyst will be assessed for competency in all aspects of performing the wet prep procedure AND successfully read a set of slides of typical wet prep images, administered by OSDH Public Health Laboratory (a score of 80% or better is required to pass), prior to being allowed to perform the wet prep procedure independently for clinical purposes.

***Repeated Unsuccessful Performance In Proficiency Challenges***

As per Nursing Services policy, PPM analysts who repeatedly demonstrate unsuccessful performance after failure of two consecutive or two of three consecutive PT challenges will receive disciplinary notification and ultimately may lose privileges to perform wet prep testing.

# Vaginal Wet Prep Procedure: Training & Competency Assessment Form

The following is used to document initial training and periodic competency assessment of all permanent, part-time and contract staff performing Wet Prep testing in County Health Departments (nurses and physicians). Initial training and competency assessment must be performed by an individual currently considered competent to train/evaluate another individual in the Wet Prep procedure (see *Wet Prep Training Policy* for details). Per CLIA, competency must be assessed at the point of initial training, at 6 and 12 months (1<sup>st</sup> year only), and yearly thereafter. Training/competency assessment should cover all aspects of the procedure, including specimen collection, preparation, analysis, recording results and reporting. The Evaluator should observe the Analyst perform a minimum of 2 specimens, including saline and KOH on each specimen.

**Name Person Evaluated:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Name Evaluator:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Purpose:**  Initial Training  6 Month Evaluation (1<sup>st</sup> Year Only)  Annual Evaluation  Remedial Training  
If remedial training, state reason:

**Assessment Procedure:** The Evaluator should ensure the Analyst has read the procedure, and observe and ask questions of the Analyst to determine their knowledge base for each step of the procedure. Use the fields below to record impressions of the Analyst's performance (additional copies of this form may be used as needed).

- Specimen collection
- Specimen preparation
  - Saline wet prep
  - KOH wet prep
- Microscope operation
- Slide interpretation
- Record results (use tables to right)
- Cleaning/maintenance of microscope
- Knowledge of laboratory test environment

Slide 1: Saline _____	
Time Collected/Rec'd:	
Yeast	
Trichomonas	
WBCs	
Clue cells	
RBCs	
Whiff	
Time Completed	

Slide 1: KOH _____	
Time Collected/Rec'd:	
Yeast	
Trichomonas	
WBCs	
Clue cells	
RBCs	
Whiff	
Time Completed	

**Comments:**

Slide 2: Saline _____	
Time Collected/Rec'd:	
Yeast	
Trichomonas	
WBCs	
Clue cells	
RBCs	
Whiff	
Time Completed	

Slide 2: KOH _____	
Time Collected/Rec'd:	
Yeast	
Trichomonas	
WBCs	
Clue cells	
RBCs	
Whiff	
Time Completed	

**Overall Assessment:** (use back of form as needed)

Is remedial training required?  Yes  No If YES, state remedial action plan to achieve satisfactory performance. If NO, this indicates that the above mentioned analyst is determined to be able to work independently in the collection of vaginal samples from patients, in processing samples for saline and KOH wet slide preparation, in microscopic examination of the slides for critical indicators of infection, and in documentation and reporting of results.

**Signature / Title of Analyst:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature / Title of Evaluator:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature PHL Director or Designee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Submit this form to the Field Laboratory Operations section of the OSDH Public Health Laboratory:**

**Fax to 405-271-8755 (or 405-271-4850).**

Training Policy for Vaginal Wet Preparation PPM - Version: 1.3. Index: FLO 562. Printed: 23-Apr-2014 05:00

Authorized on: 22-Apr-2014. Authorized by: S. Terence Dunn, PhD. Policy Unique Reference: 599-39389521. Due for review on: 22-Apr-2015

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