	Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities			
	Document type	Practice Pattern Report	WG/Committee	WGRE
	Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
	Version	March 15, 2011	Approval date	20110402
	Drafting date		Status	Public

**WMDA Donor Registries Working Group
Recommendations on the Training of Staff Performing Patient - Donor Search and HLA Matching
Activities**

Irina Evseeva¹, Kelly Coffey², Susanne Morsch³, Valentine Parguey⁴

¹Anthony Nolan (UK), ²National Marrow Donor Program (USA), ³International Search Centre Stefan-Morsch-Stiftung (Germany), ⁴France Greffe de Moelle Registry (France)

INTRODUCTION

Searching for matched unrelated donors (MUD) and cord blood units (CBU) on behalf of a patient seeking a stem cell transplant encompasses a wide range of work activities at each donor registry. Staff performing this function plays an integral role in searching databases of MUD and CBU on behalf of transplant centers/international donor registries and their patients. In some settings, staff performing this function is also responsible for performing Human Leukocyte Antigen (HLA) matching and donor selection.

Specifically, staff performs a query of Bone Marrow Donors Worldwide (BMDW) and their own registry database in order to get a global summary of potential donors. Staff may also approach international registries directly to obtain more detailed donor information (e.g. updated HLA genotype, donor availability, age etc).


Depending on the patient’s genotype and number of potential donors available, the search may be extended to pursue mismatched donors. CBU may be searched on behalf of all patients or only searched based on a specific patient’s need - subject to Registry’s policy or Transplant Centre request. Overall, staff performing these functions is responsible for facilitating pending patient searches and may also be responsible for confirmatory typing and workup requests with multiple transplant centres and donor registries.

A committee was established consisting of WMDA members from different countries to develop recommendations regarding consistent training of staff performing search duties worldwide. The committee elected to survey WMDA membership to determine how the training of such staff was currently managed.

SUMMARY OF SURVEY

The first survey was distributed to 15 WMDA accredited registries in September 2009 and 11 responses were received.

The survey showed that the job description of staff performing these functions varies significantly depending on the size of the Registry and the number of searches going through it. The smaller Registries employ experts who can give professional advice on the donor selection, or even select the donors for the Transplant Centres, in addition to the routine search run. The bigger registries have different members of staff for these functions. For example, some staff (i.e. Search Coordinators in some registries) deals with routine searches and CT requests, while Search Managers/Analysts/Supervisors would provide the advisory service. In these cases the differences in key roles define different recruitment criteria and training programs.

	Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities			
	Document type	Practice Pattern Report	WG/Committee	WGRE
	Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
	Version	March 15, 2011	Approval date	20110402
	Drafting date		Status	Public

The results of this survey were reported at WMDA meeting in Minneapolis 2009 and revealed a necessity of the second survey with better definition of the positions in question.

The second, updated survey was distributed to 17 WMDA accredited registries in May 2010. Based on the job descriptions and main duties three main types of positions involved in Search process were determined: Graft (MUD/CBU) Database **Search** position, Graft (MUD/CBU) **Selection** position and Graft (MUD/CBU) Database **Search and Selection** position. The brief definition of the positions was given and the same following questions were asked for each type of positions:

1. Essential recruitment criteria
2. Desirable recruitment criteria
3. New staff training system
4. Ongoing staff training system

10 replies to the second survey were received from the countries responded to the first survey and there was one new entry. Following WMDA meeting in June 2010, the survey was sent to all WMDA membership; five new responses were received.

Final analysis of the data provided by 16 registries from different parts of the world (America, Pacific Region, Western and Eastern Europe) and of different sizes was performed. The results of the survey were discussed at the WMDA Donor Registry Working Group session in Minneapolis in October 2010, and the following recommendations on recruitment and training of staff performing patient - donor search and HLA matching activities, were suggested.

RECOMMENDATIONS


In this letter we provide our recommendations for staff recruitment as well as initial and ongoing training criteria based on the results of the updated survey. These recommendations do consider separately staff performing MUD and CBU database search (supplement 1), staff performing HLA matching and donor/CBU selection (supplement 2), as well as staff performing both search and graft selection activities (supplement 3). It is also important to note that some staff may (or may not) also have additional roles that could have additional requirements for consideration.

We suggest that these recommendations would apply to the new staff only, recruited after the document has been approved and published. It was also agreed that staff, especially those with long-term experience but without documented qualification, would benefit from having WMDA Certification system. It was decided to suggest WMDA DRWG to consider the new project to create Search Coordinators Certification System that could have on-line education/training modules, one or multi-level exam papers and could use the NMDP transplant coordinators certification - Certified Haematopoietic Transplant Coordinator (CHTC) - as a possible model.

We also suggest that DRWG consider further project to develop recommendations regarding training of other Registry staff, namely Harvest Coordinators.

Acknowledgements

The project group would like to thank all members of the WMDA Donor Registries Working Group, who participated in discussing this document, for their valuable comments.

	Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities			
	Document type	Practice Pattern Report	WG/Committee	WGRE
	Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
	Version	March 15, 2011	Approval date	20110402
	Drafting date		Status	Public

**Supplement 1. Graft (MUD/CBU) Database Search position
(Staff not performing HLA matching and donor selection)**

I. Recruitment and hiring recommendations

1. Science/Healthcare degree or equivalent is not essential, but desirable.
2. Knowledge of Human Leukocyte Antigen (HLA) system is not essential, but familiarity is desirable.
3. Confident knowledge of English is essential, and fluency is desirable.
4. Confident use of Office software is essential; use of special software is desirable.
5. Other recruitment criteria include excellent communication and interpersonal skills, good stress handling, trustworthiness, attention to details, initiative, good team working.

II. New staff introductory training

1. One-to-one training by the experienced member of staff for three months as standard, but could be longer if required.
2. Work under supervision for six months as standard, but could be longer if required.
3. General training to cover:
 - Human Resources related issues;
 - Policies, Procedures and Standards of the Registry/Donor Centre;
 - Overview of diseases treated with haematopoietic stem cells;
 - Donation methods;
 - Overview of blood born pathogens and their impact on HSCT.
4. Job specific training should include:
 - Introduction on structure and function of HLA system;
 - HLA nomenclature;
 - Systems and tools of search for a matched unrelated donor (MUD) through the Registry, BMDW, international registers and Cord Blood Banks according to the relevant standard operating procedures (SOPs);
 - Methodology of records, files and data storage, internal and external communication, electronic systems (e.g. European Marrow Donor Information System, (EMDIS));
 - Overview of matching programs (e.g. BMDW, Haplogic, Optimatch);
 - Case study training on MUD and cord blood units search.

III. Ongoing professional training

1. Regular review of relevant Policies, Procedures, Standards, Nomenclature – once a year or more often when necessary;
2. Regular case audit/assessment by supervisor/management – twice a year or more often when necessary;



Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities

Document type	Practice Pattern Report	WG/Committee	WGRE
Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
Version	March 15, 2011	Approval date	20110402
Drafting date		Status	Public

3. Attendance of job-related internal and external training courses, lectures, seminars – at least once a year;
4. Attendance of relevant national and international conferences – once a year (subject to funds);
5. Staff may consider obtaining special certification (Certified Haematopoietic Transplant Coordinator (CHTC) or local equivalent if applicable).

Supplement 2. Graft (MUD/CBU) Selection position (Staff performing HLA matching and donor selection)

I. Recruitment and hiring recommendations


1. Science/Healthcare degree or equivalent is highly desirable.
2. Advanced knowledge of HLA system is essential.
3. Confident knowledge of English is essential, and fluency is desirable.
4. Confident use of Office software is essential; use of special software is desirable.
5. Other recruitment criteria include good problem solving, excellent customer service skills, staff management experience, and ability to work in a team.

II. New staff introductory training

1. One-to-one training for one month as standard, but could be longer if required.
2. Work under supervision for one month as standard, but could be longer if required.
3. General training to cover:
 - Human Resources related issues;
 - Policies, Procedures and Standards of the Registry/Donor Centre;
 - Diseases treated with haematopoietic stem cells;
 - Donation methods;
 - Blood Borne Pathogens.
4. Job specific training should include:
 - Refreshing on structure and function of HLA system;
 - Refreshing on HLA nomenclature;
 - Detailed training on patient/donor matching programs (e.g. BMDW, Haplogic, Optimatch) to include match predictions based on linkage disequilibrium (LD) in HLA regions as well as common and rare haplotypes in different ethnic groups
 - Case study training in understanding donor selection for CT and work up
 - Non-HLA criteria of donor selection

III. Ongoing professional training

1. Regular review of relevant Policies, Procedures, Standards, Nomenclature – once a year or more often when necessary;
2. Regular patient case assessment by management – twice a year or more often when necessary;
3. Attendance of job-related internal and external training courses, lectures, seminars – several times a year;

	Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities			
	Document type	Practice Pattern Report	WG/Committee	WGRE
	Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
	Version	March 15, 2011	Approval date	20110402
	Drafting date		Status	Public

4. Attendance of relevant national and international conferences – 1-2 times a year (subject to funds)
5. Staff may consider obtaining special certification (CHTC or local equivalent if applicable).

Supplement 3. Graft (MUD/CBU) Database Search and Selection position
(Staff running the searches and performing donor selection)

I. Recruitment and hiring recommendations

1. Science/Healthcare degree or equivalent is highly desirable.
2. Familiarity with HLA system is essential, good or advanced knowledge is desirable.
3. Confident knowledge of English is essential, and fluency is desirable.
4. Confident use of Office software is essential; use of special software is desirable.
5. Other recruitment criteria include good communication and interpersonal skills, good stress handling, problem solving, attention to details, initiative, good team working.

II. New staff introductory training

1. One-to-one training for three months as standard, but could be longer if required.
2. Work under supervision for five month as standard, but could be longer if required.
3. General training to cover:
 - Human Resources related issues;
 - Policies, Procedures and Standards of the Registry/Donor Centre;
 - Diseases treated with haematopoietic stem cells;
 - Donation methods;
 - Blood Born Pathogens.
4. Job specific training should include:
 - Introduction/Refreshing on structure, function and nomenclature of HLA system;
 - Systems and tools of search for MUD through the Registry, BMDW, international registers and Cord Blood Banks according to the relevant SOPs;
 - Methodology of records, files and data storage, internal and external communication, electronic systems (e.g. EMDIS);
 - Detailed training on patient/donor matching programs (e.g. BMDW, Haplogic, Optimatch) to include match predictions based on linkage disequilibrium in HLA regions as well as common and rare haplotypes in different ethnic groups
 - Case study training in understanding donor selection for CT and work up. Non-HLA criteria of donor selection.

III. Ongoing professional training

1. Regular review of relevant Policies, Procedures, Standards, Nomenclature – once a year or more often when necessary;
2. Regular patient case assessment by management – twice a year or more often when necessary;



Recommendations on the Training of Staff Performing Patient – Donor Search and HLA Matching Activities

Document type	Practice Pattern Report	WG/Committee	WGRE
Document reference	20110402-WGRE-PPR-Search Coord	Approved by	WBRD
Version	March 15, 2011	Approval date	20110402
Drafting date		Status	Public

3. Attendance of job-related internal and external training courses, lectures, seminars – at least once a year;
4. Attendance of relevant national and international conferences – 1-2 times a year (subject to funds)
5. Staff may consider obtaining special certification (CHTC or local equivalent if applicable).