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of BSM Consulting of Incline Village, NV

How Does Your Surgical Tech Training Measure Up?

SCRUB IN AND FIND OUT

By Joseph F. Jalkiewicz,
Contributing Editor

Earlier this year, when Eagles quarterback Nick Foles was named Most Valuable Player in Super Bowl LII, he was quick to share the glory with his teammates, including Jason Kelce.

As the team's starting center, Kelce played a key role in his team's winning season. But far from just snapping the football, he was also responsible for communicating key protection calls and deft blocking that helped the underdog Eagles score their first Super Bowl victory.

In many respects, you could say the surgical technician — or scrub tech — serves as the “center” of the ASC team. Far from simply “snapping” the surgeon the next instrument, these key players are also responsible for such vital tasks as ensuring the sterility of the operating room and surgical instruments and communicating clearly and effectively with the surgical team during surgery.

As a result, effective training is vital to their success — and that of the entire ASC.

“Effective training directly relates to patient outcomes,” says Laurie K. Brown, MBA, COMT, COE, senior consultant with BSM Consulting of Incline Village, NV. “Insufficient training inhibits the team's ability to provide a seamless, accurate, and efficient outcome.”

“They have to be adequately trained,” agrees Vanessa

Sindell, RN, BSN, MSN, a consultant with Progressive Surgical Solutions, an ASC consulting firm. “If they aren't, damage to the eye can occur, mistakes can be made, and, in the worst case, the wrong surgery could be performed.”

“[Scrub techs] work the closest with the surgeons,” Sindell adds. “They must anticipate what instrument may be needed next, and they must be prepared to quickly hand the surgeon what he needs when he needs it. This is vitally important for scrub techs, who are doing the same cases repeatedly — cataracts, stents, trabs. And that rare time that something goes wrong, the scrub tech must be prepared and calm — in many cases, leading the nurses or surgeons in what supplies are needed.”

Hiring: Choose Wisely

Effective scrub technician training begins with hiring the right candidates. At some ASCs, that means hiring only certified technicians who have eye surgery experience, while at others it may mean hiring techs from other fields, or even those fresh out of surgical technician school.

“I only hire certified scrubs, drawn from local schools or hospital programs,” says Lynne Aron, nurse manager of the Cleveland Clinic Foundation's Cole Eye Institute.

Sindell, on the other hand, can speak to the benefits of

hiring scrub techs fresh out of school.

“I’ve had great experiences hiring scrub techs with no eye experience,” Sindell says. “I think if the facility has a strong tech team and the capacity to train a new scrub tech, then lack of experience shouldn’t determine whether or not someone is hired. The nice thing about someone with no experience is that you can mold them to your system and practices more easily.”

Although she doesn’t think certification is necessary for hiring, Sindell says prospective scrub techs should have at least graduated from an accredited program.

“If you do hire a tech who isn’t licensed, you can always make obtaining licensure one of the goals on his or her performance appraisal,” she adds.

Brown cautions that hiring decisions should always be made very carefully.

“A person who is unable to develop self-confidence with knowledge and skill acquisition, unable to take responsibility for actions or team efforts, or unable to accept constructive criticism positively and act on it — no matter how it is given — should not be a candidate,” she says. “Also, while it may seem superficial, someone who is loud or verbose, who argues, debates, or is defensive also is not a good candidate.”

On the other hand, Brown says, candidates who demonstrate “a history of confidence, quiet efficiency, as well as good ideas and insights should be good trainees. This type of person will likely offer additional solutions to help make the ASC team even better over time.”

How Long Should Training Take?

Once a new hire is on board, expect to spend the next 12 weeks — at minimum — training him or her on your facility’s customs regarding basic scrub-

bing skills, room turnover, instrument re-processing, sterilization, aseptic technique, ASC staff positions and responsibilities, and any other details that might fall under the new hire’s purview as a member of your center’s surgical team.

“In my experience, teaching a certified technician from the ophthalmic practice setting to scrub in the ASC and be on his or her own takes no less than 3 months,” Brown says. “The more procedures a new scrub tech is exposed to, the more he or she will be able to help the team. The same rigor for learning other case types cannot be skipped. For example, just because they’ve been solo on a cataract case, that doesn’t mean they can be solo for other procedures.”

Aron says it takes 4 to 5 months for new surgical technicians to complete training in all specialties at Cole. Sindell says ASCs should, on average, expect “at least 4 to 6 weeks of training in the OR, and then another 2 to 4 weeks for room turnover and instrument reprocessing — if that is something your techs do. Longer if they have no experience.”

Who Should Train the New Scrub Tech?

It takes a special touch to train while working in an OR setting, Brown says. Never can the surgeon nor the patient feel the training while working, and never can the process or procedure be slowed or compromised by the training.

“Learning to be a scrub tech is exciting and very stressful,” she says. “Teachers should be encouraging, where appropriate, while also firm and instructive, as there simply is no room for creativity in many aspects of surgical assisting and scrubbing. Most importantly, a surgeon should never ‘feel’ they have inexperienced help during surgery.”

Regardless of who your new hires are — rookie or veteran — or where they come from — local program or another practice — they should be matched with and trained under the guidance of highly skilled, veteran scrub techs or nurses.

“Ideally, another scrub tech will train the new scrub tech,” says Sindell, who also recommends creating an orientation checklist of skills that can be signed off as they are mastered.

“This builds in accountability for the facility and staff member. It also ensures that the staff member is getting trained on everything he or she might encounter,” she says.

Aron agrees, noting that new hires get “a preceptor, so my assistant nurse manager and I can keep up with weekly evaluations. We can tell from experience if someone isn’t making the cut. We meet and have an intensive plan to concentrate on the needed aspect of [improvement] in the surgical experience.”

It’s also a good idea to have new scrub techs meet regularly with your director of nursing to ensure they’re keeping up with orientation. This will allow the director of nursing to schedule the new hire in the right room, and make adjustments to ensure the new hire is receiving effective training.

“It also ensures that new scrub techs are keeping their manager in the loop if they need help with a specific task or skill. That way, the scrub techs aren’t scrubbing into cases where they don’t know what they’re doing, which could affect patient safety,” Sindell says.

Brown recommends that an OR nurse teach new scrub techs the fine points of sterility, gowning, and gloving. She also recommends having students read about these aspects first so that the operating room, tables,

Dos and Don'ts: A Checklist for Training

DO:

- **Provide your new tech with a "Trainee" nametag.** OR staff can get stressed in an urgent situation and staff need to know who they can give directions to and count on in an emergency.
- **Train logically.** OR procedures, protocols, and sterile technique must all be communicated and understood before performing any duties.
- **Provide practice tools.** Allow trainees to practice gowning and gloving and passing instruments correctly before performing them in a live OR.
- **Train in the care and handling of delicate eye instruments.** It can be costly if new hires aren't properly trained.
- **Provide the same training for all new staff.** This applies even to experienced scrub techs from other practices. This enables you to evaluate existing technique and train to your center's standards.
- **Introduce your new hire to the surgeon at the beginning of the day.** Explain who the new hire is and what he or she will be doing that day.
- **Teach the tech to communicate with the surgeon before the case.** Even if the schedule says you're doing 10 cataract procedures, there could be something different

or more challenging about one or more of the cases, and it is important to be prepared.

- **Expect the new tech to take ownership of their orientation process.**
- **Have different vendors come in to train new staff for lens loading or using the phaco machine.**
- **Try to have the same person orienting the new scrub tech throughout training.**

DON'T:

- **Let a new scrub tech fly solo too soon.** The surgeon and surgical team need to be supported fully and consistently.
- **Bring the wrong personality into the OR.**
- **Assume because you showed the new hire something once, he or she will remember and do it right the next time.**
- **Assume your new scrub tech knows how to scrub a case.** Always ask before you make the assignment.
- **Overlook the importance of teaching sterility, surgical site ID, universal protocol, and standard precautions.** Not all new scrub techs know these things, and even veterans could use a refresher.
- **Assign new scrub techs to surgeons who are difficult to work with or don't like working with new staff.** It's not conducive to learning.

instruments, autoclaves, gowns, and gloves won't seem so overwhelming when introduced in person.

"The ASC can seem something like a foreign planet at first," she says. "The nurse trainer should be chosen by the administrator as one who does most everything by the book and likes to teach others."

Similarly, Brown says, surgical cases should be taught by the facility's "best scrub tech, if that person is a natural teacher with patience.

"If not, training can be augmented by the trainee observing the best-of-class in action after receiving step-by-step training by another experienced scrub tech. This position is often taught through a 'see several, do several' philosophy, but it is most important that the whys of each step of the job be explained so they are retained," she says.

Brown, Sindell, and Aron all emphasize the role of veteran surgical technicians in the successful training of new scrub technicians.

"It is vitally important for the learners to study the steps and whys of procedures, and to shadow other experienced technicians scrubbing those procedures, and to be shadowed a few times when they scrub new case types," Brown says. "In my experience, shadowing the best while they talk through everything they are doing and why is invaluable for the student. That voice needs to be the one the students hear in their heads while they work on their own."

Over time, the student scrub tech will begin to perform some of the steps while the trainer observes and coaches. Gradually, the new scrub tech will perform more steps, and the teacher will perform fewer. The next step is weaning the student from coaching, but only when both are confident everything will be done correctly, and any unexpected events can be handled well.

"It is a thrilling day for both when the teacher is there with the student but the teacher no longer needs to scrub in," Brown says. ■