

## Guidance Document for Training Documentation Template

**PURPOSE:** This template is intended to provide UW-Madison biological research laboratories with a means of documenting lab-specific biological safety training activities. This template is designed to capture all purposes for training, training methods, topics covered, and means of competency verification. Remember, “if it isn’t documented, it didn’t happen.”

### INSTRUCTIONS FOR COMPLETING TEMPLATE

Please complete every section in the Training Documentation Template. More than one item can be chosen for each section.

- **DATE:** The date can be selected by clicking the dropdown arrow and choosing a date on the calendar.
- **PURPOSE:** Indicate the reason the training was held, select all appropriate choices. Example: if the group is having annual refresher training in addition to discussing a new procedure and SOP, each of those boxes should be selected.
- **FORMAT:** Select all appropriate choices by checking those boxes. Example: If a lab meeting is held in which the material is presented via PowerPoint and discussion is included, check both the PowerPoint and Discussion/tabletop boxes.
- **TOPICS:** Select all appropriate choices. Example: If annual refresher training is conducted covering many different topics, select *all* topics covered.
- **BRIEF DESCRIPTION:** Add a summary of the training activities that occurred. Example: If an annual refresher training was held to cover the lab protocol and safety manual along with a new inactivation procedure, provide a description of topics covered for the training.
- **COMPETENCY VERIFICATION:** Indicate the means by which competency was verified. While a quiz or test is not required, some may opt to quiz participants to verify understanding. It may be sufficient to capture signatures where participants, by signing, are verifying that they understand the content of the material presented.
- **TRAINER:** Print the name of the person conducting the training along with their signature.
- **List of Participants:** Print the names of the participants in the left column and signatures in the right column. Participants must be given opportunity to ask questions. By signing, participants are indicating that they understand the content of the material presented to them. Add additional pages as necessary to allow for additional participants to be added.

**DOCUMENT RETENTION:** Training documentation must be retained for a minimum of 7 years beyond the completion of research activities. Additionally, departments and schools may have retention schedules which may be greater than the university minimum. Check with your department, college/school, or unit to determine the required length of time that training documents must be retained.

## Example Described In Guidance Document

Select reasons for training →

**DATE:** 4/25/2022

← Click in box to select date

**PURPOSE:**

- Annual Refresher     New Procedure     Ad hoc     New Hire  
 Incident retrain     SOP Amendment     Other:

**FORMAT:**

- PowerPoint     Discussion/tabletop     Drill     Other:

← Select training format

Select topics covered →

**TOPICS COVERED** (check all that apply):

- |  |   |   |
|--|---|---|
| <input checked="" type="checkbox"/> Entry/exit SOP               | <input checked="" type="checkbox"/> PPE Donning/doffing | <input checked="" type="checkbox"/> Agent/Biological material information |
| <input checked="" type="checkbox"/> Inactivation                 | <input type="checkbox"/> Autoclave safety               | <input checked="" type="checkbox"/> Decontamination of surfaces           |
| <input type="checkbox"/> Signage                                 | <input type="checkbox"/> Cryogen safety                 | <input checked="" type="checkbox"/> Biological Material disposal          |
| <input checked="" type="checkbox"/> BSC use                      | <input type="checkbox"/> Centrifuge safety              | <input checked="" type="checkbox"/> Transport of biologicals              |
| <input checked="" type="checkbox"/> Biosafety protocol           | <input checked="" type="checkbox"/> Sharps safety       | <input checked="" type="checkbox"/> Emergency procedures                  |
| <input checked="" type="checkbox"/> Lab Biosafety Manual         |   | <input checked="" type="checkbox"/> Equipment failure procedures          |
| <input checked="" type="checkbox"/> Biological spill outside BSC |   | <input checked="" type="checkbox"/> Exposure procedures                   |
| <input checked="" type="checkbox"/> Biological spill inside BSC  |   | <input type="checkbox"/> Other:   |

Provide brief training description →

**BRIEF DESCRIPTION:** Annual refresher training in which the laboratory biosafety manual was covered as well as the addition of a new inactivation method (added to SOP #74). PI presented material, the group discussed, and a quiz to verify understanding was administered.

**COMPETENCY VERIFICATION:**

- Quiz     Hand's-on assessment     Signature (below)     Other (explain)

**TRAINER** (print and sign): Dr. Bucky Badger, *Bucky Badger*

Trainer and Trainees print & sign

**List of Participants** (print) and Signatures (add pages as needed)

Lucy Trainee	<i>Lucy Trainee</i>
Ted Trainee	<i>Ted Trainee</i>

*\*By signing this document, I acknowledge that I have received training on the topics indicated above, understand the content, and have been given the opportunity to address whatever questions I might have.*

## Example Verification Quiz (from template example above)

Annual Refresher Training/New SOP verification quiz

PI: Dr. Bucky Badger

Date: 4-25-2022

Name: Xxxxx Xxxxx

1. True or False: As described in our BSL3 lab safety manual materials can be removed from our BSL3 lab without first inactivating them.
  - a. True
  - b. False
2. Which of the following statements is correct:
  - a. I am not required to keep up with lab training.
  - b. Training is optional but will make me a better scientist.
  - c. I am required to complete all required training as determined by my PI, university and regulatory requirements.
3. True or False: The PI is ultimately responsible for all aspects of training in the laboratory:
  - a. True
  - b. False
4. According to our Biosafety Protocol and Lab Biosafety Manual I am required to be fit tested for and wear the following respirator when working in ABSL3 infecting mice with SARS-CoV-2
  - a. Respiratory protection is not required for this activity
  - b. A dust mask
  - c. N95
  - d. SCBA (self-contained breathing apparatus)
5. I attended the annual refresher/new SOP training and understand the content of the material presented to me.
  - a. True
  - b. False