

Facilitator Guide

Qualified Technical Service (QTS) Facilitator Guide**Overview.**

The purpose of this document is to act as a guide for the class facilitator. It will help the facilitator understand the objective of the class and will help ensure that the core competencies of the class are covered. It will also help the facilitator understand the timing of the class.

This guide will cover items to be done before the training event, during the training event, and after the training event.

Before the Training Event

Training begins before the students ever arrive onsite. Several items must be accomplished to ensure you have a successful training event.

A **month** before the training event:

- Ensure eLearning prerequisites have been assigned.
- Send participants a welcome email appointment. This appointment should include:
 - A formal welcome to the training
 - A reminder to complete the eLearning prerequisites before arriving at the training event.
 - Dates and times of the training event.
 - Location of the training event.
 - Travel instructions on how to get to the site from the airport.
 - Parking instructions
 - Hotel recommendations.
 - Food recommendations
 - Class agenda.
 - Software installation requirements
 - Tool requirements
 - Facilitator contact information with an invitation to contact with any questions.
- Reserve the physical classroom for the days needed.
- Reserve Catering for the days needed.
- Send classroom materials to the printers for printing.
- Ensure tools will be in calibration for the days needed. If they are not, send them to calibration to be calibrated.

A **week** before the training event:

- Ensure participants have completed the required prerequisite eLearning
- Send a follow-up email. The follow-up email should contain the following:
 - A reminder of the upcoming class
 - A reminder to complete the Prerequisite eLearning if they have not already done so.
 - A reminder to book travel and lodging
 - A reminder to install the needed software on their computer.
 - Facilitator contact information with an invitation to contact with any questions.
- Ensure the classroom is booked for the days needed.
- Ensure the catering is booked for the days needed
- Ensure the classroom technologies such as microphones, Wi-Fi, and overhead computers are available.
- Ensure tools are available and calibrated.
- Ensure Student books have been received

- Review slides and slide notes
- Review facilitator materials and guides
- Create name placards for students.

A **day** before the training event:

- Ensure classroom technologies are tested and ready.
- Ensure training devices are tested, configured, and ready
- Ensure all applications are ready and up to date if needed. (STS, Customer Portal, and VSP)
- Ensure all tools are ready and calibrated.
- Ensure all training materials reviewed are ready.

The **day** of the training event:

- Arrive at least one hour early to set up the classroom.
 - Sometimes participants will arrive early. You do not want to keep them waiting.
- Ensure classroom materials are prepared and ready to go.
 - Name placards are placed on tables
 - Student guides are placed on tables
 - Training PowerPoint is open and the main page is on screen.
 - This helps the students know they are in the right place.

Class Structure:

- No more than two people per device. No more than 5 devices per class.
- Recommended 2 instructors for classes greater than 5 people.

Tools needed (1 per device unless specified.)

- Handheld Sealer
- Hemostats
- Safety Analyzer (Calibrated)
- 1500 kg Weigh Station Calibration weight (Calibrated)
- 250g APS calibration weight (Calibrated)
- Calibration Tool (Calibrated)
- Metric Allen Wrench set 2mm-5mm (Calibrated)
- Metric Open End Wrench Set (Calibrated)
- Orange Sticks
- Torque Wrench/Screwdriver 6-36 in*lb. (Calibrated)
- Torque Wrench/Screwdriver 6-36 in*lb. (Calibrated)
- Snap ring pliers.

Consumables needed (1 per device unless specified.)

- Sep sets for Calibration Tool repair (every 5 uses) and OQ
- Leak Detector
- Centrifuge Mounting Hardware (every 3 replacements)
- AC - 1 bag
- Saline - 1 bag

Sequence of Instruction

Step	Mode & Duration (hh: mm)	Slide #	Activity	Tools and Notes
DAY 1				
1	N/A	1	1. Have the title slide on the screen as participants enter the room.	This helps participants know they are in the right place.
2	Whole group discussion: Welcome (00:15) 8:15	2	<ol style="list-style-type: none"> 1. The facilitator states their name, current position, number of years with the company, technical background, and something non-work related. 2. In turn, participants state their name, current position, number of years with the company, technical background, and something not related to work. 3. The facilitator indicates the locations of restrooms, break areas, electrical outlets, and other general information. 	Optional activity. The technical background information should be used to gauge how in-depth the facilitator might have to go over some technical concepts.
3	Presentation: Agenda Course objectives and resources (00:15) 8:30	3-5	<ol style="list-style-type: none"> 1. The facilitator explains the schedule for each day of training. 2. The facilitator describes assessments that will occur during the trial, including their purpose, formats, success measures, and implication as a qualification to participate as an operator in the evaluation. 3. The facilitator goes over the terminal objectives and what the participant will be able to accomplish upon completion of the course. 4. The facilitator goes over the class resources. The list of the tools the participant can use during the class. 5. The facilitator will ensure the participant has the updated versions of the Service Manual and STS 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
4	Presentation: What is Rika (00:2) 8:32	6-8	<ol style="list-style-type: none"> 1. The facilitator transitions the student's mindset from Rika being an automated apheresis system to Rika being a complex electro-mechanical system. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes

5	Instruction: Service manual use and demonstration (00:10) 8:42	9	<ol style="list-style-type: none"> 1. Refer to the document “How to use the CHM format.” 2. The facilitator should provide a demo of how to use the service manual. 3. The facilitator describes how to look up service messages, diagrams, and systems. 4. Encourage participants to follow along on their computers. 	<ul style="list-style-type: none"> ▪ Service Manual
6	Instruction: Workshop instructions (00:5) 8:47	10- 12	<ol style="list-style-type: none"> 1. Inform participants of the purpose of the workshops. 2. Inform participants of the rules such as active conversations, active participation, and use of resources. 3. Inform participants of the resources they will be required to use. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
7	Instruction and demonstration: Service Software (00:20) 9:07	13- 14	<ol style="list-style-type: none"> 1. The facilitator reviews the purpose of service software. 2. The facilitator reviews how to access it. 3. The facilitator demonstrates how to use service software including the hardware tab, auto-test tab, calibration tab, configuration tab, and logs tab. 4. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
8	Instruction: High-pressure and cuff air systems (00:15) 9:22	15- 18	<ol style="list-style-type: none"> 1. The facilitator reviews the high-pressure functional description. 2. The facilitator reviews the cuff air functional description. 3. The facilitator should use slide notes for key points. 4. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes ▪ High-pressure air system drawing ▪ Cuff air system drawing
9	Break (00:10) 9:32	N/A	N/A	N/A
10	Hands-on practice: High-pressure and cuff air workshop (02:30) 12:00	19- 20	<ol style="list-style-type: none"> 1. Workshop 1 <ol style="list-style-type: none"> a. Participants remove the outer panels of the Rika device. b. Participants remove the air module. c. Participants identify major components of High-pressure and cuff air systems. d. Participants replace air module e. Participants enter service software f. Participants apply power to the unit and run the multifunction auto-test. g. Participants use the multifunction hardware tab to manually control the high-pressure air system and cuff air system. 	<ul style="list-style-type: none"> ▪ Workshop 1 ▪ Air modules R and R ▪ 4 mm Hex key
12	Lunch (00:30) 12:30	N/A	1. N/A	<ul style="list-style-type: none"> ▪ N/A
13	Whole group discussion: High-pressure and cuff air	21- 22	<ol style="list-style-type: none"> 1. Have participants answer review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes

	workshop review (00:10) 12:40			
14	Whole group instruction: AC pump assembly (00:15) 12:55	23-25	<ol style="list-style-type: none"> The facilitator reviews the AC pump assembly functional description. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
14	Hands-on practice: AC pump assembly workshop (01:00) 14:00	26-27	<ol style="list-style-type: none"> Workshop 2 <ol style="list-style-type: none"> Participants remove the AC pump assembly. Participants identify major components of AC pump assembly. Participants replace the AC pump assembly. Participants enter service software Participants apply power to the unit and run the AC pump assembly auto-test. Participants use the AC pump assembly hardware tab to manually control the AC pump assembly. 	<ul style="list-style-type: none"> Workshop 2 AC pump assembly R and R 4mm Hex key
15	Whole group discussion: AC pump assembly workshop review (00:10) 14:10	28	<ol style="list-style-type: none"> Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
16	Break (00:10) 14:20	N/A	N/A	N/A
17	Whole group instruction: Power System (00:15) 14:35	29-31	<ol style="list-style-type: none"> The facilitator reviews the power system's functional description. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
18	Hands-on practice: Power System workshop (01:00) 15:35	32-33	<ol style="list-style-type: none"> Workshop 3 <ol style="list-style-type: none"> Participants remove the power system. Participants identify the major components of the power system. Participants replace the power system. Participants enter service software Run electrical safety test. 	<ul style="list-style-type: none"> Workshop 3 Power system R and R 4mm Hex key Electrical safety analyzer
19	Whole group discussion: Power System workshop review (00:10) 15:45	34	<ol style="list-style-type: none"> Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes

Step	Mode & Duration (hh: mm)	Slide #	Activity	Tools and Notes
Day 2				
1	Group discussion: Review and Q&A (00:15) 8:15	N/A	1. Participants ask questions or express concerns; the facilitator provides answers, using flip chart paper “parking lot” to record pending items.	<ul style="list-style-type: none"> Chart paper, marker
2	Whole group instruction: Draw and return assemblies (00:15) 8:30	35-38	<ol style="list-style-type: none"> The facilitator reviews the draw and return pump assembly functional description. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
3	Hands-on practice: Draw and return assemblies workshop (02:30) 11:00	39-40	<ol style="list-style-type: none"> Workshop 4 <ol style="list-style-type: none"> Participants remove the draw and return pump assemblies. Participants identify the major components of the AC pump assembly. Participants replace the draw and return pump assemblies. Participants enter the service software. Participants apply power to the unit and run the draw and return pump assembly auto-test. Participants use the draw and return pump assembly hardware tab to manually control the draw and return assemblies. 	<ul style="list-style-type: none"> Workshop 4 Draw and return pump assemblies R and R Standard Metric Hex Key Set
4	Break (00:10) 11:10	N/A	1. The brake should occur in the middle of the above step	N/A
5	Whole group discussion: Draw and return assemblies workshop review (00:10) 11:20	41-42	<ol style="list-style-type: none"> Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
6	Lunch (00:40) 12:00	N/A	N/A	N/A
7	Whole group instruction: Soft cassette housing assembly (00:15) 12:15	43-45	<ol style="list-style-type: none"> The facilitator reviews the soft cassette housing assembly functional description. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes

8	Hands-on practice: Soft cassette housing assembly workshop (01:00) 13:15	46-47	<ol style="list-style-type: none"> 1. Workshop 5 <ol style="list-style-type: none"> a. Participants remove the soft cassette housing assembly. b. Participants identify major components of soft cassette housing assembly. c. Participants replace soft cassette housing assembly. d. Participants enter service software e. Participants apply power to the unit and the run draw and return pump assembly auto-test. f. Participants use the draw and return pump assembly hardware tab to manually control soft cassette housing assembly. 	<ul style="list-style-type: none"> ▪ Workshop 5 ▪ soft cassette housing assembly R and R ▪ Standard Metric Hex Key Set
9	Whole group discussion: Soft cassette housing assembly workshop review (00:10) 13:25	48	<ol style="list-style-type: none"> 1. Have participants answer review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
10	Break (00:10) 13:35	N/A	N/A	N/A
11	Whole group instruction: Dual-valve assembly (00:15) 13:55	49-51	<ol style="list-style-type: none"> 1. The facilitator reviews the dual-valve assembly functional description. 2. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
12	Whole group instruction: Weight station / Beacon and saline bag pole assemblies (00:15) 14:10	52-54	<ol style="list-style-type: none"> 1. The facilitator reviews the dual-valve assembly functional description. 2. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
13	Hands-on practice: Dual-valve / Weight station / Beacon and saline bag pole assemblies workshop (01:00) 15:10	55-56	<ol style="list-style-type: none"> 1. Workshop 6 <ol style="list-style-type: none"> a. Participants remove the dual-valve / weigh station/beacon and saline bag pole assemblies. b. Participants identify major components of the dual-valve / weigh station/beacon and saline bag pole assemblies. c. Participants replace the dual-valve / weigh station/beacon and saline bag pole assemblies. d. Participants enter service software e. Participants run dual-valve assembly auto-test. f. Participants use the draw and return pump assembly hardware tab to manually control soft cassette housing assembly. 	<ul style="list-style-type: none"> ▪ Workshop 6 ▪ Dual-valve R and R ▪ Weigh station R and R ▪ Beacon and saline bag pole R and R ▪ Standard Metric Hex Key Set

14	Whole group discussion: Dual-valve / Weight station / Beacon and saline bag pole assemblies workshop review (00:10) 15:20	57-58	<ol style="list-style-type: none"> 1. Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
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Step	Mode & Duration (hh: mm)	Slide #	Activity	Tools and Notes
Day 3				
1	Group discussion: Review and Q&A (00:15) 8:15	N/A	1. Participants ask questions or express concerns; the facilitator provides answers, using flip chart paper “parking lot” to record pending items.	<ul style="list-style-type: none"> Chart paper, marker
2	Whole group instruction: Centrifuge/centrifuge chamber assemblies (00:15) 8:30	59-62	<ol style="list-style-type: none"> The facilitator reviews the draw and return pump assembly functional description. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
3	Hands-on practice: Centrifuge/centrifuge chamber assemblies workshop (02:00) 10:30	63-64	<ol style="list-style-type: none"> Workshop 7 <ol style="list-style-type: none"> Participants will remove and replace the centrifuge motor. Participants identify major components of Centrifuge/centrifuge chamber assemblies. Participants replace Centrifuge/centrifuge chamber assemblies. Participants enter service software Participants apply power to the unit and run the multifunction auto-test. Participants use the multifunction hardware tab to manually control the Centrifuge/centrifuge chamber assemblies. Participants will remove and replace the leak detector. Participants will remove and replace the multifunction CCA 	<ul style="list-style-type: none"> Workshop 7 Leak detector R and R Centrifuge Motor R and R Multifunction CCA R and R Standard Metric Hex Key Set
4	Break (00:10) 10:40	N/A	1. The brake should occur in the middle of the above step	N/A
5	Whole group discussion: Centrifuge/centrifuge chamber assemblies workshop review (00:15) 11:00	65-66	<ol style="list-style-type: none"> Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> Facilitator slide guide Powerpoint notes
6	Lunch (00:30) 11:30	N/A	N/A	N/A

7	Whole group instruction: Control System (00:15) 11:45	67-70	<ol style="list-style-type: none"> 1. The facilitator reviews the control system's functional description. 2. The facilitator will discuss STS and what can be done using this program. 3. The facilitator will discuss the CAN Bus. 4. The facilitator should use slide notes for key points. 5. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
8	Hands-on practice: control system workshop (02:00) 13:45	71-72	<ol style="list-style-type: none"> 1. Workshop 8 <ol style="list-style-type: none"> a. Participants will remove the touchscreen. b. Participants will remove the SSD. c. Participants will connect to the device with STS. d. Participants will upgrade the software. 	<ul style="list-style-type: none"> ▪ Workshop 8 ▪ SSD R and R ▪ Touchscreen R and R ▪ Standard Metric Hex Key Set ▪ STS
9	Break (00:10) 13:55	N/A	<ol style="list-style-type: none"> 1. The brake should occur in the middle of the above step 	N/A
10	Whole group discussion: control system workshop review (00:10) 14:05	73	<ol style="list-style-type: none"> 1. Have participants answer review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes

Step	Mode & Duration (hh: mm)	Slide #	Activity	Tools and Notes
Day 4				
1	Group discussion: Review and Q&A (00:15) 8:15	N/A	1. Participants ask questions or express concerns; the facilitator provides answers, using flip chart paper “parking lot” to record pending items.	<ul style="list-style-type: none"> ▪ Chart paper, marker
2	Whole group instruction: Troubleshooting Standard (00:15) 8:30	74-75	<ol style="list-style-type: none"> 1. Facilitator reviews the troubleshooting standard 2. The facilitator should use slide notes for key points. 3. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
3	Hands-on practice: Troubleshooting workshop (02:30) 11:00	76-77	<ol style="list-style-type: none"> 1. Workshop 9 <ol style="list-style-type: none"> a. Facilitator should put a different fault in each of the 1-5 machines. b. The participants will rotate machines troubleshooting the major system. c. When all participants have completed all faults send them on break and install the faults that have not been done 	<ul style="list-style-type: none"> ▪ Workshop 9 ▪ Standard Metric Hex Key Set ▪ Facilitator slide guide ▪ Powerpoint notes
4	Break (00:10) 11:10	N/A	The break should take place during the above step.	<ul style="list-style-type: none"> ▪ N/A
5	Whole group discussion: Troubleshooting workshop review (00:10) 11:20	78	<ol style="list-style-type: none"> 1. Have participants answer review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
6	Lunch (00:40) 12:00	N/A	1. N/A	<ul style="list-style-type: none"> ▪ N/A
7	Whole group instruction: IQ/OQ/PQ/PM (00:15) 12:15	79-80	<ol style="list-style-type: none"> 1. The facilitator reviews IQ / OQ / PQ / PM 2. The facilitator should use slide notes for key points. The facilitator should ask questions to the class relating to the key points. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes
8	Hands-on practice: IQ, OQ, PQ, and PM workshop (02:00) 14:15	81-82	<ol style="list-style-type: none"> 1. Workshop 10 <ol style="list-style-type: none"> a. Participants will complete the IQ, OQ, PQ, and PM b. Participants will run all Auto-tests c. Participants run all calibrations. d. Participants will replace the calibration tool pressure leads. e. Participants will complete a fluid test. 	<ul style="list-style-type: none"> ▪ Workshop 10 ▪ Standard Metric Hex Key Set ▪ IQ / OQ / PQ / PM ▪ 1500 g weight ▪ 250 g weight ▪ Calibration tool ▪ Separation set ▪ Plasma bottle ▪ Electrical safety analyzer
9	Break	N/A	1. The brake should occur in the middle of the above step	<ul style="list-style-type: none"> ▪ N/A

	(00:10) 14:25			
10	Whole group discussion: IQ, OQ, PQ, and PM workshop workshop review (00:10) 14:35	83	<ol style="list-style-type: none"> 1. Have participants answer the review questions. Go around the room. Make sure everyone has a chance to talk. 2. If questions are answered incorrectly try to correct the understanding. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes

Step	Mode & Duration (hh: mm)	Slide #	Activity	Tools and Notes
Day 5				
1	Group discussion: Pre-test Review and Q&A (01:00) 9:00	84	1. Participants ask questions or express concerns; the facilitator provides answers, using flip chart paper “parking lot” to record pending items.	<ul style="list-style-type: none"> ▪ Chart paper, marker
2	Break (00:10)	N/A	N/A	<ul style="list-style-type: none"> ▪ N/A
3	Test: Final Test (01:30) 10:30	85	<ol style="list-style-type: none"> 1. The facilitator hands out the test. 2. The facilitator instructs participants to put their names on the test. 3. The test is 20 questions. 80% is passing. 4. Participants may use all resources. 	<ul style="list-style-type: none"> ▪ Facilitator slide guide ▪ Powerpoint notes ▪ Service Manual ▪ Workshops ▪ R and Rs ▪ Rika device
4	Group discussion: Post-test Review and Q&A (01:00) 11:30	86	1. Participants ask questions or express concerns; the facilitator provides answers, using flip chart paper “parking lot” to record pending items.	<ul style="list-style-type: none"> ▪ Chart paper, marker
5	Lunch (00:30) 12:00	N/A	N/A	<ul style="list-style-type: none"> ▪ N/A
6	Provide Class Feedback: (00:30) 13:00			<ul style="list-style-type: none"> ▪