PROCEDURE
Corewell Health East - Laboratory Education - Department-Specific Education Program

This Procedure is Applicable to the following Corewell Health sites:
Corewell Health Beaumont Grosse Pointe Hospital, Corewell Health Beaumont Troy Hospital, Corewell Health Dearborn Hospital, Corewell Health Farmington Hills Hospital, Corewell Health Taylor Hospital, Corewell Health Trenton Hospital, Corewell Health Wayne Hospital, Corewell Health William Beaumont University Hospital (Royal Oak)

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Functional Area:	Laboratory
Lab Department Area:	Lab - General

1. **Principle**
   A. Various federal and state regulatory agencies, and laboratory accrediting agencies, require that staff be properly trained in the areas of patient confidentiality and privacy, compliance, specimen collection and safety. The responsibility for proper staff education in these areas lies with the health system human resources, compliance, safety and laboratory departments.
   B. Purpose: The purpose of this procedure is to provide guidance to Corewell Health East (CHE) Laboratory leaders (directors, managers, supervisors, designees) and team members regarding the annual health system compliance education and the laboratory department-specific education program at each respective Corewell Laboratory campus.

2. **Responsibility**
   Laboratory leadership will assign, monitor and/or document completion of mandatory education requirements by their individual team members within annually published timelines.

3. **Definitions**
   A. **Corporate Education** – annual, system-wide mandatory education developed by Corewell Health subject matter experts in Compliance, Safety, Information Technology, Business Assurance, etc. This education is automatically assigned in the Workday Learning application and is required of all team members (employed/non-employed, contingent workers, volunteers). In the CHE laboratory, this includes physicians, bio-scientific staff, managerial, technical and non-technical team members as well as students. This education is assigned as pre-hire learning, during on-boarding/orientation, service-break and annually thereafter based on job role.
   Example: The CHE Annual Compliance Education program is comprised of the following modules:
      1 - Compliance Program
      2 - Safeguarding Sensitive Data
      3 - Privacy and Information Security
      4 - Workplace Safety
      5 - Infection Prevention

Entities will reference associated Documentation contained within this document as applicable
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      6 - Health Care Safety

Notes:
1. Workplace Safety covers Fire, Electrical, Medical Equipment, Radiation, Hazard Communication, Team Member Safety, Patient Safety and Emergency Management.
2. This role-based education is comprised of content relevant to a team member's position within one of the following roles:
   a. Clinical - team members who provide daily hands-on care for patients.
   b. Clinical Support - team members who provide patient support activities and who may have some direct patient contact.
   c. Not Patient Facing - team members who are not directly involved in patient care but support business activities.
3. Any team member who completed the new hire corporate education will not be assigned the annual compliance education in the same year.

B. **Laboratory Department-Specific Education** - role-based, online mandatory education developed by the CHE Laboratory education and safety committees. It covers laboratory-specific topics such as hazard communication, dry ice and formaldehyde safety, chemical hygiene, chemical waste, spill clean-up training, sharps injury prevention, specimen collection, transfusion practices, etc. This education is available in Workday Learning and will be assigned to team members by the manager/supervisor (or designee) based on job role and hire status.
Refer to the procedure below and associated attachments for further details.

C. **Epic Beaker Laboratory Information System Education** – training that incorporates multiple learning activities such as:
1. New Hire Curriculum consisting of online modules automatically assigned in Workday Learning based on job role and required security template. This includes: (a) '"Basics" curriculum; (b) supplemental "Custom" Laboratory Epic (Beaker) curriculum; (c) extra "Continuing Education" on various Anatomic Pathology and Clinical Pathology workflows for anytime education as preferred.
2. Beaker "How To" Guides for specific LIS tasks
3. Review of department workflows and procedures
4. Practice scenarios and exercises
5. Demonstrated and supervised practice with a designated trainer
Refer to the **Laboratory Education - EPIC Beaker Training and Security Access** procedure for further information.

D. **New Hire -** any team member (employee) who is new to the organization, a transfer from another non-laboratory department or a former Corewell Laboratory employee who has not worked during the past 6 months (also referred to as a service-break employee).

4. **Procedure**
   A. **Laboratory Workforce**
   1. New hires (as defined above) are required to complete all assigned education by the due dates specified in their Workday Learning account including:
      a. Corewell Health pre-hire learning and additional orientation compliance education
      b. Epic Beaker LIS education and training
      c. Laboratory-specific education requirements during the first week (or first 40 hours if part-time) or before they have access to patients or access patient or other confidential information.
   2. Current employees not considered a new hire must complete all assigned Corewell Health annual compliance education, as well as any Laboratory-specific education, by the specified deadlines in their Workday Learning account.
      a. Employees can confirm course completion by viewing their learning transcript in the Workday Learning application. (Printing a copy is recommended for employee's personal education records.)
   3. Employee responsibility for this education is defined in the following Corewell Health System Policy: **Competency & Qualification Requirements (including Orientation)** – Team

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Procedure Reference #: 33077   Procedure Version #: 2   Effective Date: 11/12/2025   Page 2 of 5

Member Responsibilities: 3.2.2. Responsible for completing all assigned health and safety requirements including required immunizations, orientation, learning requirements, educational assignments, and competency assessments on or before the due date and/or expiration date.

4. Non-compliance will be subject to the Performance Improvement Process described in the Corewell Health System Policy: **Coaching and Performance**.

B. Manager/ Manager/Supervisor (or Designee)

1. Assign the respective laboratory-specific learning program available in the Workday Learning application to your team members as follows:
   a. **New hires** – upon hire with a 1-week due date
   b. **Current staff** – annually by February 1st with a due date of September 1st
   c. Refer to the attachment - *Annual Education Checklist for Laboratory Staff* - for the complete list of learning programs and associated online courses.
   d. Refer to the attachment - *Enroll Team Member in Lab Programs in Workday Learning* - for guidance on locating the learning programs and completing the enrollment in Workday.
   e. Refer to the article KB0047328 - Workday Learning: Enroll My Team Member(s) – Leader - for additional information.
   f. NOTE: If a particular course is not critical to a job-role, the manager can use their discretion and exempt the team member from that assignment. (E.g., LAB119 – Waste Handling and Disposal for laboratory administrative support staff.)

2. Confirm all **new hires (including transfers and service-break employees)** complete all assigned on-line mandatory education within the published due dates:
   a. Corewell Health orientation education within **30 days of hire.**
   b. Laboratory-specific education requirements **during the 1st week** or **before they have access to patients, patient information or other confidential information.**
   c. NOTE: Probationary and contingent employees put their employment status at risk if they do not complete their assigned education requirements before they have access to patients or access patient or other confidential information.

3. Conduct laboratory section-specific **safety training with new hires.**
   a. Refer to the **Laboratory Education - New Hire Orientation** procedure and its associated attachments *New Laboratory Employee Safety Training Checklist* and *New Employee General Orientation Checklist.*
   b. NOTE: This training should include employees who transfer from one lab section to another since hazard risks can vary between laboratory sections and campuses.

4. Confirm all **current employees** are aware of the annual Corewell Health and Laboratory-specific education requirements and completion deadline(s).
   a. The typical training window for completing corporate education requirements is May 15th through June 30th barring any major IT system go-lives.
   b. The typical training window for CHE laboratory-specific education requirements is February 1st through September 1st.

5. Review section employee annual compliance education progress and completion results on a regular basis using one of the reporting applications listed below.
   a. **Service Now:** Access the **HCM Annual Education Totals** dashboard on your team.
      1. Type your name under Supervisory Organization. The "HCM My Team's Learning - Required Only" report may be used to view learning progress as well as your direct reports completion.
      2. Refer to the article KB0048097- Workday: View and Run Reports for details.
   b. **Workday**: Via the **My Team Management** application, leaders can access, view, and run a variety of reports to track your team's required learning as follows:
      1. Search for Learning Assignment Reports.
      2. Click on HCM My Team's Learning Assignments.

3. When prompted type in your name in the Learning Organizations for Learning Assignment and select the supervisory organization you wish to run the report for.
4. Click the OK button to generate your report.
5. Refer to the article KB0049345 - [Workday Learning: Track My Team's Learning](#).

6. Report on your team's annual education completion status at standing meetings with Laboratory Director and/or as requested by the local Laboratory Operations Specialist for inspection readiness.
7. Remind employees that completing their assigned courses is strongly recommended **before** the compliance department and laboratory deadlines.
8. Follow-up with employees who still have an "Enrolled" status on any corporate or laboratory-specific mandatory education assignment. Remind them of the impending education deadline and the effect of non-compliance on their performance evaluation.
9. For employees who remain non-compliant after the mandatory education deadline(s):
   a. Refer the employee to the system-wide **Competency & Qualification Requirements** policy (section 5.2.2.2 Team Member Qualifications and Education) to review the expectation that "assignments issued from the learning management system will be completed on or before the assigned due date."
   b. Initiate a written Progressive Discipline Performance Improvement Plan as outlined in the system-wide policy **Coaching, Performance Correction and Internal Appeal.** Document that it was the employee's responsibility to complete courses by the published deadline and that they are now "non- compliant".
   c. Require the employee to complete current year compliance education ASAP.
   d. Document continued non-compliance in the employee's current annual performance snapshot as part of Performance and Development process.
   e. Notify your campus Laboratory Director of any employee non-compliance and completion of the Progressive Discipline Performance Improvement Plan.
10. Notify your campus Laboratory Director of any employees on a leave of absence who will be unable to meet the education completion deadline(s).
11. Conduct job-role training and competency assessment utilizing section-specific training and competency assessment procedures and checklists. (Refer to the **Laboratory Education - Employee Training** and **Laboratory Education - Employee Competency Assessment Program** procedures for further details.)
12. Each January, generate an "end-of-year" completion report for inspection readiness.

C. Laboratory Directors
1. Review completion reports with laboratory managers/supervisors on a regular basis to ensure targeted deadlines are met.
2. Consult with managers/supervisors to determine extent of job performance risk and subsequent action plan for any employee who has not met the corporate and/or laboratory-specific mandatory education deadlines.

D. Laboratory Education Program Manager (or MLS Faculty Designees)
1. Complete Workday Learning Partner training.
2. Work with designated laboratory subject matter experts to create, update, maintain and upload laboratory-specific education online (digital) courses into the Workday Learning application.
3. Create learning programs for key laboratory job roles in Workday Learning containing the respective digital courses for that job role.
4. Communicate the current list of learning programs to laboratory mangers/supervisors (or designee) along with the simple guidelines for enrolling their team members. .
   a. Refer to the attachments - *Annual Education Checklist for Laboratory Staff* and *Enroll Team Member in Lab Programs* in Workday Learning.
5. Assist laboratory managers with enrollment of team members in respective job-role learning programs, as needed.

5. Revisions

Corewell Health reserves the right to alter, amend, modify or eliminate this document at any time without prior written notice.

6. References

A. Joint Commission, Comprehensive Accreditation Manual for Hospitals – current version
B. College of American Pathologists (CAP). Laboratory Accreditation Program Inspection Checklists – current version
C. Corewell Health Compliance Department: Annual Education (SharePoint site)
D. Corewell Health System Policy: Competency & Qualification Requirements (including Orientation)
E. Corewell Health System Policy: Coaching, Performance Correction and Internal Appeal
F. KB0047328 - Workday Learning: Enroll My Team Member(s) – Leader
G. KB0049345 - Workday Learning: Track My Team's Learning
H. KB0048097- Workday: View and Run Reports

7. Procedure Development and Approval

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8. Keywords

Not Set