

PROCEDURE

Corewell Health East - Staff Training and Competency Guidelines for New or Revised Transfusion Medicine Policies and Procedures

This Procedure is Applicable to the following Corewell Health sites:

Corewell Health William Beaumont University Hospital (Royal Oak)

Applicability Limited to:	N/A
Reference #:	33924
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Effective Date:	11/12/2025
Functional Area:	Clinical Operations, Laboratory
Lab Department Area:	Lab - Blood Bank

1. Principle

The purpose of this document is to provide Blood Bank staff with instructions for assessing the competency of new or revised policies. This document and the Employee Training and Competency Checklist applies to employees who have worked in the Blood Bank for more than one year. New employees, having worked in the Blood Bank for less than one year, shall be trained as described in Transfusion Medicine policy, Employee Orientation, Training, and Competency Assessment. After one year of employment in the Blood Bank, the competency and training of the new employee for new or revised policies will be documented on the Employee Training and Competency Checklist or assigned electronic signatures.

2. Responsibility

Personnel who have completed the competency requirements will perform these tasks.

3. Definitions

- A. **Designee:** Any Blood Bank technical director, or transfusion medicine fellow.
- B. **Effective date:** The date (determined by the Blood Bank supervisor or designee) on which a new or revised policy or procedure is live in PolicyTech and able to be viewed by all team members. The policies and procedures will be implemented by the Blood Bank on the effective date.
- C. **Target date:** The date by which it is expected that every Blood Bank employee will complete the electronic signature or will initial the Employee Training and Competency Checklist for each new or revised policy/procedure so that it may be deemed effective. The target date will usually be 30 days from the time that the policy/procedure is presented to the staff and will be indicated on the checklist.

4. Procedure

- A. New Transfusion Medicine policies and procedures are drafted, and existing policies and procedures are revised periodically to reflect reagent or instrumentation changes, technological advances, changes to the standard of patient care, etc. All employees must be trained and competent to perform the steps of all new or revised policies. An employee's training and

Entities will reference associated Documentation contained within this document as applicable
Printouts of this document may be out of date and should be considered uncontrolled.

competence may depend on several factors including the employee's education level, job description, the shift that the employee works, and the complexity of the policy.

- B. At a minimum, every employee who will perform the steps of a policy must read and be familiar with it. In addition, the Blood Bank supervisor or designee may assign additional training and competency assessments to account for the complexity of a policy. The additional training or competency assessments may include group or individual training, case study reviews, quizzes, or direct observation of the employee's performance.
- C. To account for the varying levels of complexity and the factors affecting the employees' training and competency, the Blood Bank supervisor or designee will assign individual competency levels which may vary for different employees. These competency levels are described below; see the Competency Levels section.
- D. A copy of each new or revised policy is provided to the employee through email, MTS or the policy system. Significant changes to revised policies will be highlighted and discussed at employee meetings or scheduled training classes as required. Training Checklists and materials will be reviewed and revised as appropriate.
- E. Medical Training Solutions© (MTS) may be used as an alternative to the Employee Training and Competency Checklist. All employees with the indicated competency level will be assigned the policy/procedure on the website. Each employee will check an attestation statement acknowledging they have completed the reading, understand the content and expectations, and abide by the policy/procedure. Employees should achieve this competency by the target date, indicated in the attestation statement.
- F. Employees' Responsibilities
 - 1. It is the responsibility of every employee to initial and date the Employee Training and Competency Checklist as described above or to electronically sign the attestation statement as described above.
 - 2. Blood Bank employees must not perform the steps of a policy unless they are confident that they have achieved the expected competency level as assigned by the Blood Bank supervisor, indicated by the employee's initials and date on the Employee Training and Competency Checklist or electronic signature in MTS.
- G. Competency Level
 - 1. Level 1
 - a. The policy is outside of the scope of employment. The employee is not required to read the policy or to initial /date the Employee and Training Competency Checklist.
 - 2. Level 2
 - a. The employee must read and be familiar with the policy. The "manner in which the employee must be familiar" with the policy will be defined on the Employee and Training Competency Checklist.
 - b. Level 2 Competency is achieved when the employee:
 - 1) Has read the policy.
 - 2) Is familiar with the policy. The "manner in which the employee must be familiar" with the policy will be defined on the checklist for employees with an assigned Level 2 competency level.
 - 3) Has had the opportunity to have questions answered.
 - 4) Has initialed and dated the checklist, to signify confidence that he or she has achieved Level 2 competency.
 - 3. Level 3
 - a. The employee has knowledge of the policies and principles described in the policy. The employee is trained and competent to perform the steps described in the policy. Level 3 Competency is achieved when the employee:
 - 1) Has read and understands the policy.
 - 2) Has completed any additional training or competency assessments, as defined on the Employee and Training Competency Checklist.
 - 3) Has had the opportunity to have questions answered.

- 4) Is confident in their ability to perform the steps of the policy with minimal supervision.
 - v. Has initialed and dated the checklist, to signify confidence that they have achieved Level 3 competency.
 4. Level 3L
 - a. This competency level is identical to Level 3, but the Blood Bank supervisor has placed limitations on the steps of the policy that the employee may perform. These limitations will be clearly defined on the Employee and Training Competency Checklist.
 5. Level 4
 - a. This competency level applies to those policies that are either performed infrequently or that are relatively complex in nature, so that only some of the Blood Bank staff is authorized to perform the steps of the policy Level 4 Competency is achieved when the employee:
 - 1) Has met level 3 competency relating this policy.
 - 2) Continues to perform periodic competency assessments as defined on the checklist.
 - 3) Has initialed and dated the checklist, to signify confidence that they have achieved Level 4 competency.
 6. All competency levels on MTS are assumed to be a level 3 unless indicated otherwise upon initial assignment.
- 5. Revisions**
Corewell Health reserves the right to alter, amend, modify or eliminate this document at any time without prior written notice.
- 6. Procedure Development and Approval**
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- 7. Keywords**
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