#### Objective:

The learner or participant will be able to explain the required steps defined in the Hospital Emergency Blood Management Plan (HEBMP) and demonstrate the required steps to respond to and manage a blood shortage in their hospital.

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| Employee Name: | | | |
| Employee Job Title: | | | |
| Type of Training: | \_ Initial | \_ Annual Assessment | \_ Retraining |
| Document Review:  \_ Hospital Emergency Blood Management Plan/Policy (current version)  \_ Laboratory procedure for Emergency Blood Management (current version) | | | |

#### Direct Observation Check:

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| **Skill** | **Key Areas of Assessment** | **Trainer’s Initials** | **Date** |
| 1. Explain how blood shortage phases relate to the HEBMP | Differentiates the different blood shortage phases including Green, Green Phase Advisory, Amber, Red and Recovery |  |  |
| Summarizes the mandate of the Hospital Emergency Blood Management Committee (HEBMC) and purpose of HEBMP |  |  |
| 2. Describe the communication and notification requirements as defined by HEBMP | Recognizes the specific communication from the blood supplier notifying Amber, Red and Recovery Phase of a blood shortage |  |  |
| Demonstrates the appropriate procedure for notifying transfusion medicine manager and others (includes documentation of notification) |  |  |
| 3. Manage inventory during a blood shortage | Explains why hospital target inventory levels require adjustment in response to blood shortage notification |  |  |
| Defines inventory adjustment required for:  - Amber, Red and Recovery Phase  \*including recall of units in satellite storage/cancel on-hold |  |  |
| Demonstrates use of CBS web based inventory reporting to report blood component inventory |  |  |
| 4. Manage blood order requests during a blood shortage | Locates the facility guidelines would be used during a blood shortage |  |  |
| Describes how facility guidelines would be used during a blood shortage |  |  |
| Identifies the correct forms to document blood order requests during a blood shortage and decisions taken |  |  |
| 5. Evaluate the Blood Shortage/ Mock Blood Shortage Event | Explains the purpose of a post blood shortage/blood shortage exercise evaluation |  |  |

#### Practical Assessment:

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| **Perform** | **Expected Outcome** | **Trainer’s Initials** | **Date** |
| Demonstrates required contingency plan activities in an exercise | Completes acceptable documentation of required activities |  |  |
| Completes competency quiz | Passes (100%) |  |  |

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| Training Completed: Trainee Signature and Date |  |
| Name of Trainer:  Name and Signature of Trainer |  |
| Laboratory Manager Review: |  |
| Date: |  |

Review the questions and complete after you have:

☐ Read the Operating Procedure for Hospital Emergency Blood Management Plan (HEBMP)

☐ Attended a demonstration or presentation on HEBMP

Submit your answers to the site appointed trainer, or your quality specialist. 100% competency must be demonstrated before the employee can be considered to be competent to respond to a blood shortage notification from the Canadian Blood Services.

#### Competency Questions:

1. What blood components/products may be affected in a blood shortage?
2. Red blood cells
3. Platelets
4. IVIG
5. All of the above
6. Which of the following could cause a national blood shortage?
7. A new infectious agent
8. Decrease in demand from hospitals
9. A snow storm affecting one blood centre
10. A multi-person vehicle accident
11. Which organization will initiate hospital notification of a blood supply shortage?
12. Ministry of Health and Long-Term Care
13. Canadian Blood Services
14. Hospital CEO
15. Local Health Integrated Network (LHIN) CEO
16. The NAC Emergency Framework for rationing blood:
17. Is intended for use for Red Phase shortages only
18. Is massively bleeding patients only
19. Is only used if NEBMC recommends
20. All of the above
21. What inventory management action needs to be taken upon receiving notification of an Amber Phase blood shortage?
22. No action is required - this is routine
23. Notify the operating room that all surgery is on hold until further notice
24. Reduce inventory levels for affected component according to hospital policy
25. Notify medical day care unit that all transfusions are on hold until further notice
26. What inventory management action needs to be taken upon receiving notification of a Red Phase blood shortage?
27. Reduce inventory target levels according to hospital procedure
28. Recall inventory from satellite locations
29. Notify blood supplier of inventory levels on hand
30. All of the above
31. What is the role of the Hospital Emergency Blood Management Committee (HEBMC)?
32. To liaise with CBS during a blood shortage
33. To keep clinical staff informed of the blood shortage
34. To liaise with the provincial Minister of Health and Long-Term Care during a blood shortage
35. To inform CBS of a blood shortage
36. Documentation of decisions regarding deferral or cancellation of transfusion during a blood shortage is critical.
37. True
38. False
39. What action should hospitals take if notification of a Green Phase Advisory is received?
40. No action is required
41. Return inventory to CBS as defined by hospital policy
42. Report hospital inventory to CBS
43. Notify hospital CEO immediately
44. What is the primary purpose of a review of a blood shortage event?
45. Pinpoint personnel who did not follow the correct procedure
46. Identify opportunities to improve the hospital plan
47. Ensure 100% of contacts were notified of the blood shortage
48. Ensure recovery to Green Phase is complete

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| Employee Name: |  |
| Date Complete: |  |
| Trainer Name: |  |
| Date Reviewed |  |
| Score: |  |

*Retain in the employee’s training file.*