

D4.1 Annual Training Plan for reviewers

Grant Agreement number: 101015514
Project acronym: SAVDON
Work Package number: WP4

Periodic report: 1st 2nd 3rd 4th X

Period covered: from 01st January to 31st December 2021

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Co-funded by
the Health Programme
of the European Union



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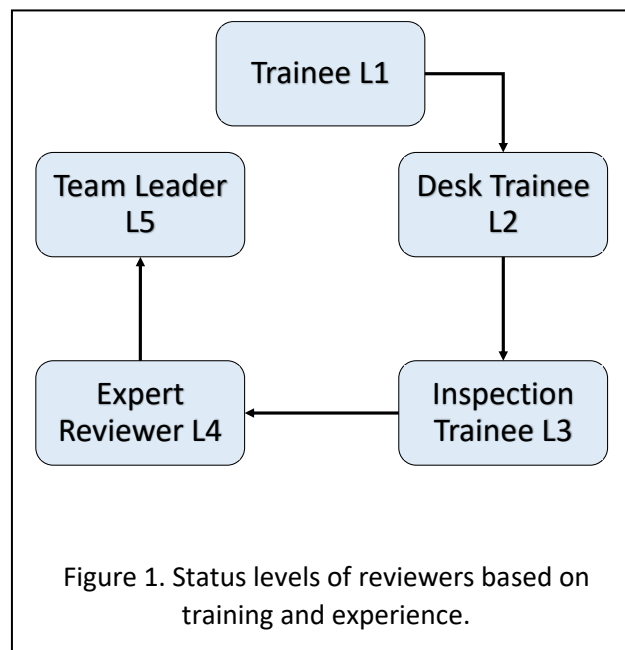
I. WMDA Reviewers

WMDA members can serve as volunteer reviewers for the WMDA registry accreditation programme. Our reviewers help registries around the world achieve a uniformity of practice based on WMDA Standards.

To become a WMDA reviewer applicants must meet three of the following criteria:

- be a current member of the WMDA (via a registry or as an individual);
- be affiliated with a member registry or associated entity as an employee or consultant as documented by a form signed by the authorized official of the registry;
- meet at least one of the following criteria regarding your experience:
 - Have at least three years of experience in some aspect of registry operations documented in your curriculum vitae.
 - Have at least two years of experience in some aspect of registry operations with focused experience or training in quality management or preparation of a registry accreditation package as documented in your curriculum vitae.

WMDA has defined different levels of competence based on based on training and experience.



Job profiles defining the level of training and experience for each level have been defined and can be found in [Annex I – Job profiles](#).



Trainee L1: All potential reviewers who comply with the requirements above and are approved by Accreditation Steering Committee become Trainee L1.

Desk Trainee L2: Desk Trainees L2 have satisfactorily completed ten modules and the final exam of [WMDA Standards Course](#) and need to gain practical experience through a desk audit. L2 Trainees can continue to next level, Inspection Trainee Level (L3), if they have a satisfactory performance during a desk audit.

Inspection Trainee L3: Desk Trainees L3 have satisfactorily completed the training requirements in [WMDA Inspection course](#) and practical experience (a desk review) and need to gain practical experience through an on-site/remote audit.

Expert Level Reviewer L4: Expert Reviewers L4 have satisfactorily completed the training requirements, [WMDA Standards Course](#) and [WMDA Inspection course](#), and practical experience (an on-site/remote audit). The transition to experienced reviewer (L4) will be acknowledged by a certificate.

Team Leader L5: Team Leader Reviewers L5 have satisfactorily completed the training requirements and practical experience

II. Annual Training Plan

WMDA has defined an Annual Training Plan for reviewers covering all levels of competence:

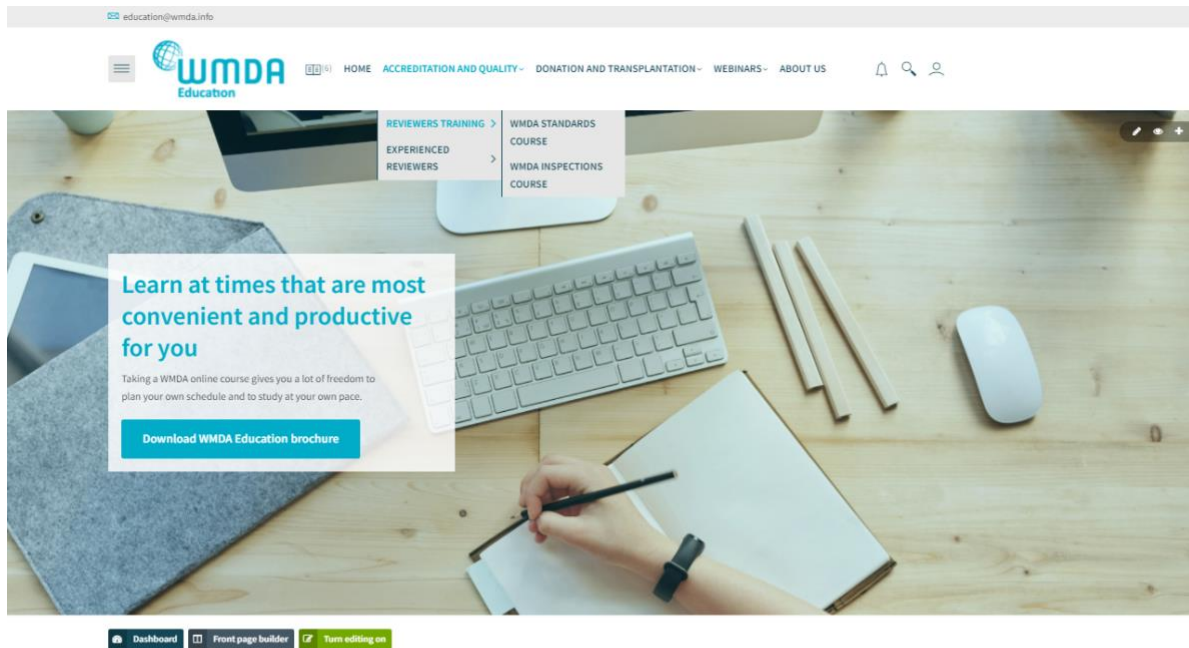
Level of competence	Training course
L2	WMDA Standards Course
L3	WMDA Inspection Course
L4&L5	WMDA Continuing education

WMDA Standards and WMDA Inspection courses have a fixed content and WMDA Continuing education is based on the weaknesses detected in WMDA Accreditation activities or changes in WMDA Standards, Policies and Procedures.

An Annual Plan has been defined and can be found in [Annex II – WMDA Educational Opportunities: Annual Training Plan](#)

All the courses have been developed and are available in WMDA Educational Platform.

Figure 1 – Overview of Reviewers Training Course in WMDA Educational Platform



Welcome to WMDA Education

Educational. Expert led. E-learning.

WMDA Reviewers Training Programme



WMDA Reviewer continuing education 2021

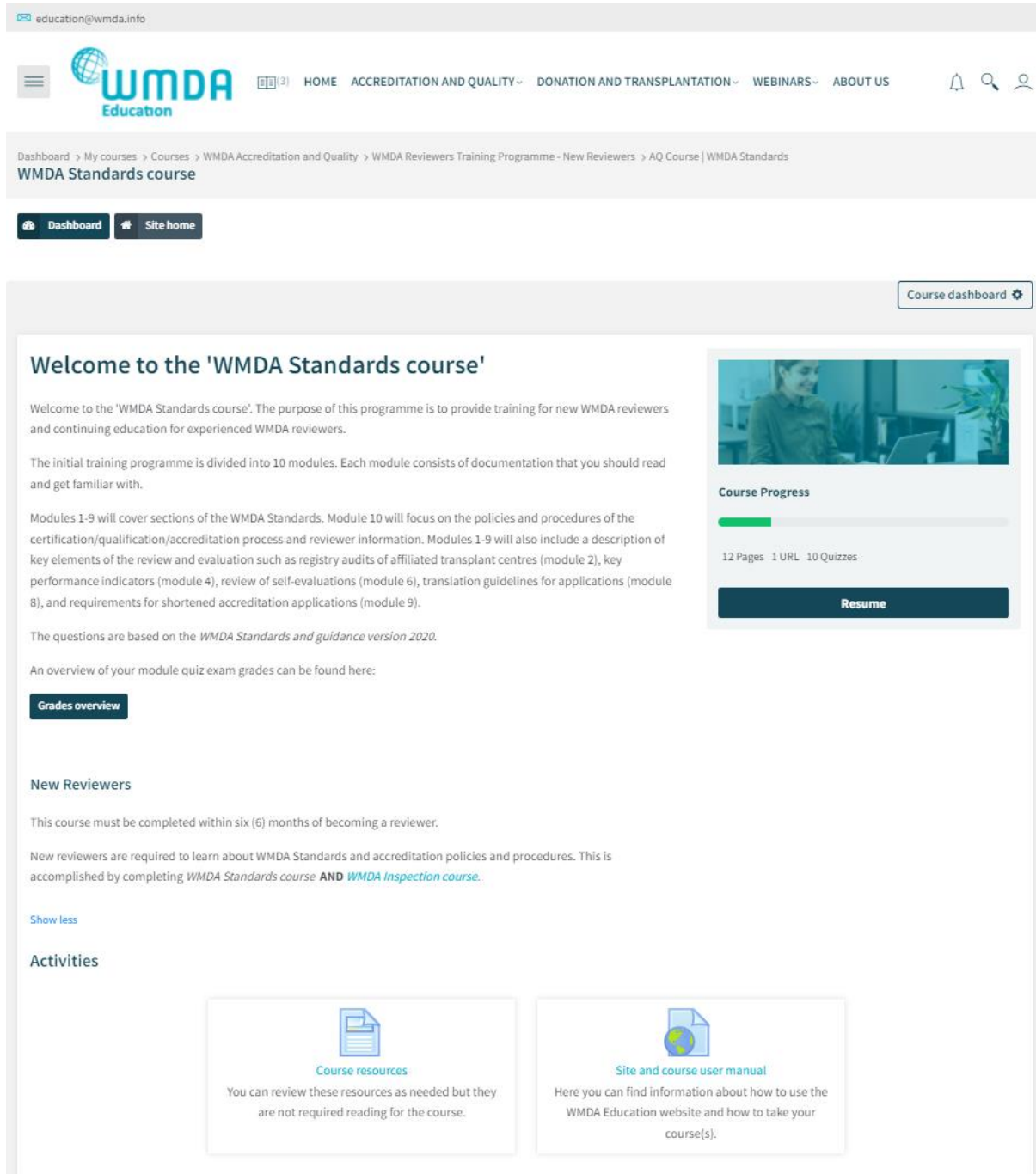
| Accreditation and quality |  Advanced Level | Continuing education for WMDA reviewers |

This course is only available for the WMDA Reviewers.

II.a) WMDA Standard Course

WMDA Standards Course covers all WMDA Standards sections. It is divided in 10 Modules and a Good Practices exam.

Figure 2 – Overview of WMDA Standards Course in WMDA Educational Platform.



The screenshot shows the WMDA Standards course overview page. At the top, there is a navigation bar with the WMDA Education logo and menu items: HOME, ACCREDITATION AND QUALITY, DONATION AND TRANSPLANTATION, WEBINARS, and ABOUT US. Below the navigation bar, the breadcrumb trail reads: Dashboard > My courses > Courses > WMDA Accreditation and Quality > WMDA Reviewers Training Programme - New Reviewers > AQ Course | WMDA Standards. The main heading is "WMDA Standards course".

The main content area is titled "Welcome to the 'WMDA Standards course'". It includes the following text:

Welcome to the 'WMDA Standards course'. The purpose of this programme is to provide training for new WMDA reviewers and continuing education for experienced WMDA reviewers.

The initial training programme is divided into 10 modules. Each module consists of documentation that you should read and get familiar with.

Modules 1-9 will cover sections of the WMDA Standards. Module 10 will focus on the policies and procedures of the certification/qualification/accreditation process and reviewer information. Modules 1-9 will also include a description of key elements of the review and evaluation such as registry audits of affiliated transplant centres (module 2), key performance indicators (module 4), review of self-evaluations (module 6), translation guidelines for applications (module 8), and requirements for shortened accreditation applications (module 9).

The questions are based on the *WMDA Standards and guidance version 2020*.

An overview of your module quiz exam grades can be found here:

[Grades overview](#)

New Reviewers

This course must be completed within six (6) months of becoming a reviewer.

New reviewers are required to learn about WMDA Standards and accreditation policies and procedures. This is accomplished by completing *WMDA Standards course* **AND** *WMDA Inspection course*.

[Show less](#)

Activities

There are two activity cards:

- Course resources**: You can review these resources as needed but they are not required reading for the course.
- Site and course user manual**: Here you can find information about how to use the WMDA Education website and how to take your course(s).

On the right side of the page, there is a "Course dashboard" widget. It features a "Course Progress" section with a green progress bar and the text "12 Pages 1 URL 10 Quizzes". Below this is a "Resume" button.

<p>Module 1 - WMDA Standards: General</p> <p>Learning objectives:</p> <ul style="list-style-type: none"> Recall WMDA Standards included in this module Describe the recommendations found in the guidance to demonstrate compliance Locate resources on W... <p>2 Pages</p>	<p>Module 2 - WMDA Standards: General organisation of the registry</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Recall WMDA Standards included in this module Describe the recommendations found in the guidance to demonstrate compliance Locate resources on WMDA Share ... <p>2 Pages</p>	<p>Module 3 - WMDA Standards: Donor recruitment, consenting, screening and testing of donors</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Recall WMDA Standards included in this module Describe the recommendations found in the guidance to demonstrate compliance Locate resources on WMDA Share (online collaboration tool) ... <p>2 Pages</p>
<p>Module 4 - WMDA Standards: Umbilical cord blood, maternal donor recruitment, consenting, screening, testing and review/release of cord blood units</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Recall WMDA Standards included in this module Describe the recommendations found in the guidance to demonstrate compliance Locate resources on WMDA Share (onL... <p>1 Page</p>	<p>Module 5 - WMDA Standards: Information technology and information management</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> Recall WMDA Standards included in this module Describe the recommendations found in the guidance to demonstrate compliance Locate resources on WMDA Share (online collaboration tool) ... <p>2 Pages</p>	<p>Module 6 - WMDA Standards: Facilitation of search requests and Second and subsequent donations of hsc and/or blood products for the same patient</p> <p>1 Page</p> <p>Restricted Not available unless any of:</p> <ul style="list-style-type: none"> The activity Module 5 - Exam quiz (2020) is complete and passed Your Email address is paulien.kort@wmda.info
<p>Module 7 - WMDA Standards: Collection, processing and transport of hematopoietic stem cells</p> <p>1 Page</p> <p>Restricted Not available unless: The activity Module 6 - Exam quiz (2020) is complete and passed</p>	<p>Module 8 - WMDA Standards: Follow-up of patient and donor</p> <p>Restricted Not available unless: The activity Module 7 - Exam quiz (2020) is complete and passed</p>	<p>Module 9 - WMDA Standards: Financial and legal liabilities</p> <p>Restricted Not available unless: The activity Module 8 - Exam quiz (2020) is complete and passed</p>
<p>Module 10 - Accreditation policies and procedures</p> <p>Restricted Not available unless: The activity Module 9 - Exam quiz (2020) is marked complete</p>	<p>Good practices exam</p> <p>Restricted Not available unless any of:</p> <ul style="list-style-type: none"> The activity Module 10 - Exam quiz (2020) is complete and passed Your Email address is STEINEROVAK@fnplzen.cz Your Email address is sherry.haun@blood.ca Your Email address is nuria@fcarreras.es 	

Each Module in WMDA Standards Course has the same structure:

- Required reading
- Required listening
- Exam quiz to complete and pass.

Only if a pass grade is achieved, you will get access to next module.

Figure 3- Overview of the structure of the different modules

1. Module 1 - WMDA Standards: General

Learning objectives:

- Recall WMDA Standards included in this module
- Describe the recommendations found in the guidance to demonstrate compliance
- Locate resources on WMDA online sites to enhance and refresh knowledge
- Comprehensively and fairly evaluate an application for certification/qualification/accreditation based on the Standards in this module
- Review a self-evaluation based on Standards in this module
- Describe the process for handling a major change notification

Requirements for completing the module:

- Read the [Module 1 - Required Reading](#)
- Listen to the [Module 1 - Required listening](#)
- Complete and pass [Module 1 - Exam quiz](#)

** You are required to review the required reading and required listening for this module before getting access to the Module Exam quiz. A minimum score of 80% (grade=8) is needed to pass this module. You have 3 attempts to complete the test and the highest score will count.*

[Go back to course overview](#)

Page



Module 1 - Required reading

[Done: View](#)

Page



Module 1 - Required listening

[Done: View](#)

Module 1 - Exam quiz

 A minimum score of 80% (grade=8) is needed to get access to the next module. You have 3 attempts to complete the quiz exam and the highest score will count.

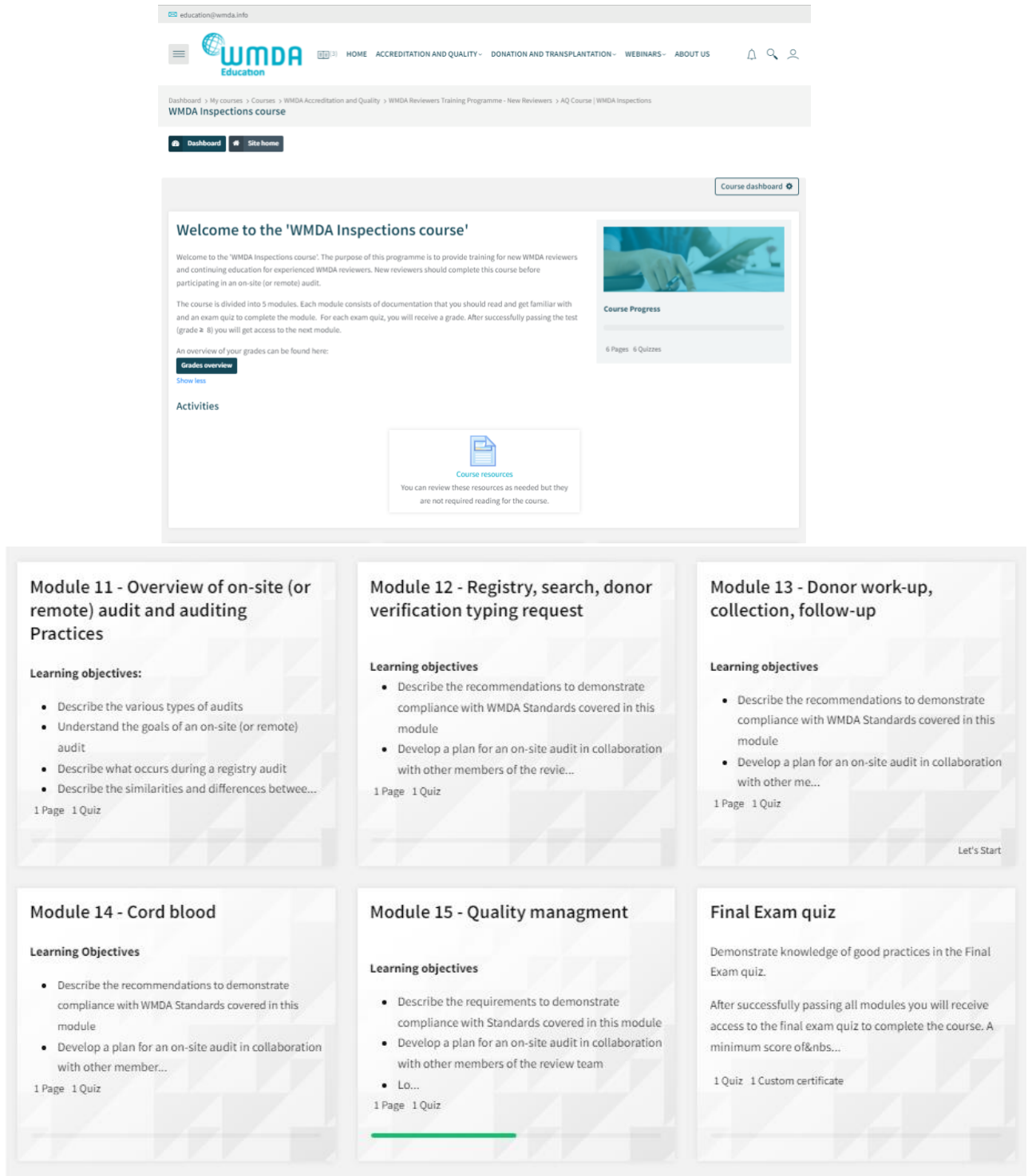
[Done: Receive a grade](#)

[Done: Receive a pass grade](#)

II.b) WMDA Inspection Course

The course is divided into 5 modules. Each module consists of documentation and an exam quiz to complete the module. For each exam quiz, a pass grade is needed.

Figure 4- Overview of WMDA Inspection Course




The screenshot displays the WMDA Education website interface for the 'WMDA Inspections course'. The top navigation bar includes links for HOME, ACCREDITATION AND QUALITY, DONATION AND TRANSPLANTATION, WEBINARS, and ABOUT US. The breadcrumb trail shows the user's path from the dashboard to the specific course page.

The main content area features a 'Welcome to the 'WMDA Inspections course'' message, explaining the course's purpose and structure. It states that the course is divided into 5 modules, each with documentation and an exam quiz. A 'Course Progress' section indicates that 6 pages and 6 quizzes are available. A 'Grades overview' link is provided for users to check their progress. Below this, there is a section for 'Activities' and a 'Course resources' box with a document icon, noting that these resources are for review and not required reading.

Below the main content area, there is a grid of six module cards, each with a title, learning objectives, and a 'Let's Start' button:

- Module 11 - Overview of on-site (or remote) audit and auditing Practices**
 - Learning objectives:**
 - Describe the various types of audits
 - Understand the goals of an on-site (or remote) audit
 - Describe what occurs during a registry audit
 - Describe the similarities and differences between...
 - 1 Page 1 Quiz
- Module 12 - Registry, search, donor verification typing request**
 - Learning objectives**
 - Describe the recommendations to demonstrate compliance with WMDA Standards covered in this module
 - Develop a plan for an on-site audit in collaboration with other members of the review...
 - 1 Page 1 Quiz
- Module 13 - Donor work-up, collection, follow-up**
 - Learning objectives**
 - Describe the recommendations to demonstrate compliance with WMDA Standards covered in this module
 - Develop a plan for an on-site audit in collaboration with other me...
 - 1 Page 1 Quiz
 - Let's Start
- Module 14 - Cord blood**
 - Learning Objectives**
 - Describe the recommendations to demonstrate compliance with WMDA Standards covered in this module
 - Develop a plan for an on-site audit in collaboration with other member...
 - 1 Page 1 Quiz
- Module 15 - Quality management**
 - Learning objectives**
 - Describe the requirements to demonstrate compliance with Standards covered in this module
 - Develop a plan for an on-site audit in collaboration with other members of the review team
 - Lo...
 - 1 Page 1 Quiz
- Final Exam quiz**
 - Demonstrate knowledge of good practices in the Final Exam quiz.
 - After successfully passing all modules you will receive access to the final exam quiz to complete the course. A minimum score of&nbs...
 - 1 Quiz 1 Custom certificate

Figure 5- Overview of structure and content of WMDA Inspection Course Module

[Course dashboard](#) 

1. Module 11 - Overview of on-site (or remote) audit and auditing Practices

Learning objectives:

- Describe the various types of audits
- Understand the goals of an on-site (or remote) audit
- Describe what occurs during a registry audit
- Describe the similarities and differences between on-site and remote audits
- Compose appropriately worded questions to ascertain compliance during an on-site (or remote) audit
- Prepare a report describing audit results


Requirements for completing the module:

- Read the [Module 11 - Required Reading](#)
- Complete and pass [Module 11 - Exam quiz](#)*

** You are required to read the required reading of this module before getting access to the Module Exam quiz. A minimum score of 80% (grade=8) is needed to pass this module. You have 3 attempts to complete the test and the highest score will count.*


[Go back to course overview](#)


Page




Module 11 - Required Reading

[Done: View](#)

 **Module 11 - Exam quiz**

 A minimum score of 80% (grade=8) is needed to get access to the next module. You have 3 attempts to complete the test and the highest score will count.

[To do: Receive a grade](#) [To do: Receive a pass grade](#)

[Module 12 - Reg...](#) 



II.c) WMDA Continuing Education

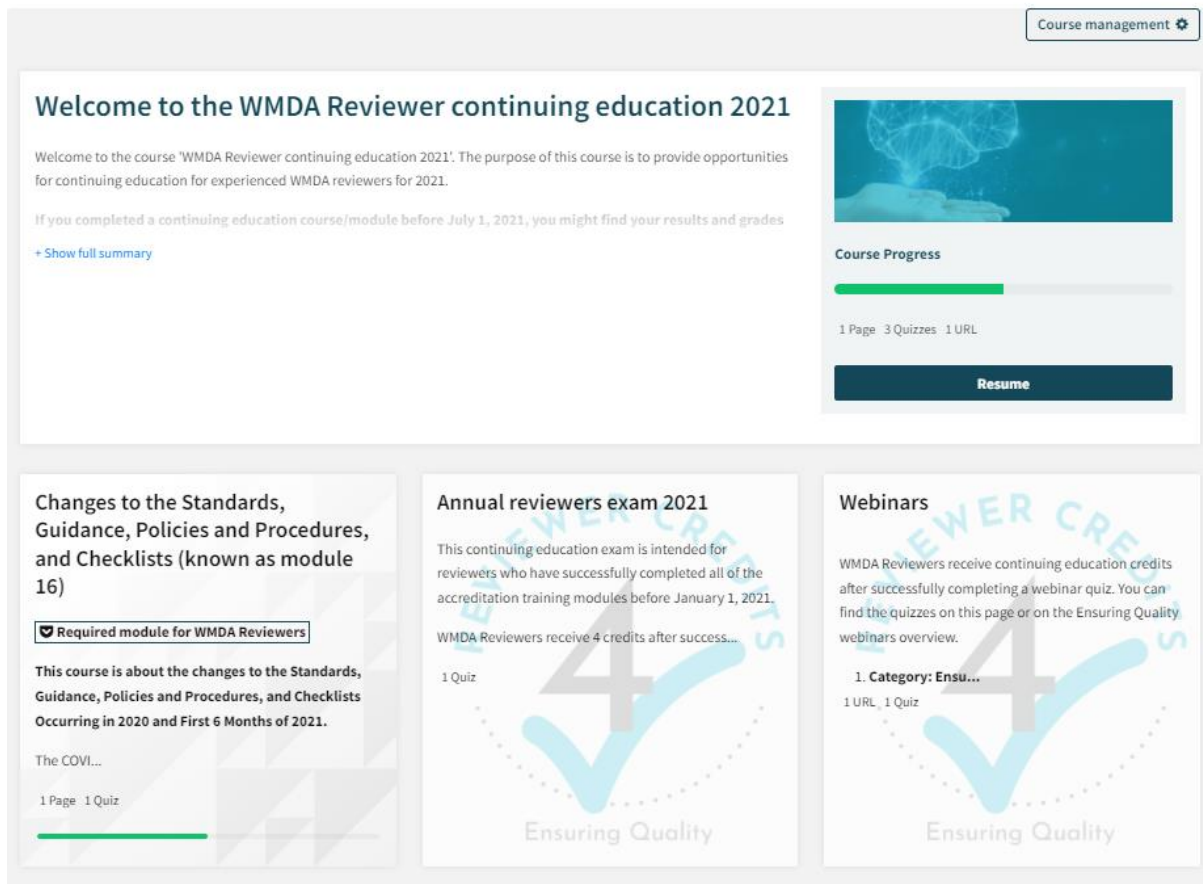
WMDA Reviewers, once they have achieved L4 or L5 level (Expert and Team Leader level), must receive sufficient continuing education to maintain and update their knowledge of WMDA Standards and the accreditation process.

The requirements they will need to fulfil are the followings:

- Perform at least one registry audit (application for either qualification or accreditation) every two years and receive satisfactory assessment in the **reviewer's performance evaluation**. Each reviewer must also review one mid-cycle surveillance at least every four years.
- Complete one module covering any new or substantially altered standards and/or policies/procedures each year (module 16)..
- Accumulate eight (8) continuing education credits each calendar year, beginning in the year after completing the entire set of reviewer training modules (modules 1-15). Credits can be obtained by:

Activity	Credits
Attending an in-person reviewer or registry training session given that year	1 credit for each 1 hour
Completing an on-line training module or webinar offered as a substitute for the reviewer/registry training session not attended in person with exam score >80%	1 credit/1 hour
Preparing/participating in one presentation for a reviewer/registry training session (in person or on-line)	4 credits
Completing annual reviewer exam with exam score >80%:	4 credits
Contributing to updating the WMDA Handbook or chairing a project that prepares a new or updated WMDA recommendation during the current year	4 credits
Participating on the Accreditation Committee, Accreditation Steering Committee, or Standards Committee	4 credits
Performing a review of an accreditation application including an on-site or remote inspection	4 credits

To comply with these requirements, a continuing education course has been developed.



The screenshot shows a course management interface for 'WMDA Reviewer continuing education 2021'. At the top right is a 'Course management' button with a gear icon. The main heading is 'Welcome to the WMDA Reviewer continuing education 2021'. Below it is a welcome message and a link to 'Show full summary'. To the right is a 'Course Progress' section with a green progress bar, indicating '1 Page 3 Quizzes 1 URL', and a 'Resume' button. Below the main heading are three course cards: 1) 'Changes to the Standards, Guidance, Policies and Procedures, and Checklists (known as module 16)', marked as a 'Required module for WMDA Reviewers', with a progress bar and '1 Page 1 Quiz'. 2) 'Annual reviewers exam 2021', with a progress bar and '1 Quiz'. 3) 'Webinars', with a progress bar and '1 URL, 1 Quiz'. All cards feature a large '4' and a checkmark, with the text 'Ensuring Quality' at the bottom.

The continuing education course has 3 sections:

- 1) Changes to WMDA Standards, Guidance, Policies and Procedures and Checklists
- 2) Annual Reviewers Exam
- 3) Webinars.

Changes to WMDA Standards, Guidance, Policies and Procedures and Checklists

This module is mandatory for WMDA reviewers.

The learning objectives of this module:

- Understanding the changes to Standards and guidance that occurred in 2020 and early 2021
- Understanding the changes in timelines caused by the pandemic
- Describe the procedures for remote audits
- Describe changes in policies and procedures
- Integrate the changes when evaluating an application for certification/qualification/accreditation



Annual Reviewers Exam

WMDA Reviewers receive 4 credits after successfully completing the annual reviewer's exam quiz. This module is not mandatory.

The learning objectives of this module:

Check and update knowledge about WMDA Accreditation programme.

Webinars


Throughout 2021, ten (10) 15-minute educational webinars were given for WMDA reviewers and all other members with an interest in quality assurance and accreditation.

Learning objectives for each Webinar can be found in **Annex II – WMDA Educational Opportunities: Annual Training Plan.**

The list of webinars that were given and the amount of people that attended, based on the statistics of the WMDA ZOOM Account:

Date	Topic	Live attendance
20210114	WMDA Pillar 4 Ensuring Quality Weekly Webinar Application Guidelines: Presenting Organizational Structure and Qualifications of Individuals by Carolyn Hurley	17
20210121	WMDA Pillar 4 Ensuring Quality Weekly Webinar Application Guidelines: Interactions with transplant centers, donor safety by Marie Kurikova	33
20210128	WMDA Pillar 4 Ensuring Quality Weekly Webinar What does the Accreditation Steering Committee Do? by Carolyn Hurley	16
20210204	WMDA Pillar 4 Ensuring Quality Weekly Webinar Working with KPIs by Andrea Mitterschiffthaler	17
20210211	WMDA Pillar 4 Ensuring Quality Weekly Webinar Remote Audits by Janet Parks	20
20210218	WMDA Pillar 4 Ensuring Quality Weekly Webinar Quality Management, SOPs and Checking Certification for Associated Entities by Salmah Ahmed	12
20210225	WMDA Pillar 4 Ensuring Quality Weekly Webinar Completing and Organizational Profile in Share by Vasiliki Gkioka	10
20210325	WMDA Virtual Meetings Week: Quality Breakout Session Pillar 4: Table Talk – Brainstorming session	51
20210325	WMDA Virtual Meetings Week: Ensuring Quality Pillar 4: Ensuring Quality	83
20210325	WMDA Virtual Meetings Week: Table talk – Couriers Pillar 4: Table Talk - Couriers	74
20210610	WMDA Quality Pillar Webinars Continued Product Code Requirement: changes in the WMDA Guidance for Standard 8.07 by Dena Mercer	11
20210617	WMDA Quality Pillar Webinars Continued Challenges Impacting Backup Donor by Ingrid Tistl	30
20210624	WMDA Quality Pillar Webinars Continued Mechanism to ask Questions or Requests for Clarification to the Standards Committee by Dena Mercer	5

Annex I – Job profiles

	Job description			
	Document type	Form-Job description	Approved by	ASC
	Document reference	F-ACC-JPE-005	Approval date	20210601
	Version	0	Pages	Page 1 of 1
	Pillar	Pillar 4-EQ – Certification Body	Status	Public



Position	WMDA Accreditation Trainee Reviewer L1	Version:	00
		Valid from:	20210601

Reporting to:	Accreditation Steering Committee	WMDA Group definition	WMDA Accreditation Reviewers
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General role description

L1 WMDA Trainees are admitted and expected to complete WMDA Reviewers Training Program to become WMDA reviewers for the WMDA Accreditation Programme.


Duties & Responsibilities

- Fill in the form to apply for WMDA Reviewers Training Programme and provide an updated CV and statement from the registry.
- Complete the Basic Reviewers Training Programme (Modules 1 to 10) including successful completion of associated quizzes and desk audit good practices exam for trainee reviewers within six months.
- Complete a survey about WMDA Reviewers Training Program.

Requirements

- Be a current member of the WMDA (via a registry or as an individual)
- Be affiliated with a member registry or associated entity as an employee or consultant as documented by a form signed by the authorized official of the registry (statement from the registry)
- Meet at least one of the following criteria regarding experience:
 - Have at least **three years of experience** in some aspect of registry operations documented in your curriculum vitae.
 - Have at least **two years of experience in some aspect of registry operations** with focused experience or training in quality management or preparation of a registry accreditation package as documented in your curriculum vitae.



	Job description			
	Document type	Form-Job description	Approved by	ASC
	Document reference	F-ACC-JPE-004	Approval date	20210601
	Version	0	Pages	Page 1 of 1
	Pillar	Pillar 4-EQ – Certification Body	Status	Public



Position	WMDA Accreditation Desk Trainee Reviewer L2	Version:	00
		Valid from:	20210601

Reporting to:	Accreditation Steering Committee	WMDA Group definition	WMDA Accreditation Reviewers
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General role description


L2 WMDA Trainees participate in one or more **desk reviews** as part of the process to become WMDA Reviewers

Duties & Responsibilities

- Inform WMDA about any conflict of interest before participating in any review.
- Sign the Confidentiality and Conflict of interest form before participating in a review.
- Be fair, unbiased, professional; do not contact the registry under review—this is the responsibility of the office.
- Inform WMDA if the review cannot be completed in a timely fashion.
- Actively participate in a **desk review** together with two experienced reviewers:
 - Comprehensively and fairly evaluate the WMDA application for the assigned organization;
 - Register their independent findings in WMDA Share;
 - Participate in the Request For Information (RFI) call together with the other members of the Review Team and the Accreditation Steering Committee representative;
 - Review and evaluate answer(s) provided by the applicant organization on the Request For Information;
 - Review Written Certification/Qualification/Accreditation Report and agree on the content with the Review Team;
 - Complete a survey after the review is complete to provide information on the review process;
 - Destroy any review materials after the review is completed;
 - Participate in WMDA continuing education for reviewers.
 -

Requirements

- Completed L1 training and approved by the Accreditation Steering Committee representative as Trainee L2
 - Completion of L1 training is determined by satisfactorily completing the Reviewers' Basic Training Course (Modules 1 to 10) with associated quizzes and the desk audit good practices exam.

	Job description			
	Document type	Form-Job description	Approved by	ASC
	Document reference	F-ACC-JPE-003	Approval date	20210601
	Version	0	Pages	Page 1 of 1
	Pillar	Pillar 4-EQ – Certification Body	Status	Public



Position	WMDA Accreditation Inspection Trainee Reviewer L3	Version:	00
		Valid from:	20210601

Reporting to:	Accreditation Steering Committee	WMDA Group definition	WMDA Accreditation Reviewers
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General role description

L3 WMDA Inspection Trainees participate in one or more **on-site/remote reviews** as part of the process to become WMDA Reviewers.


Duties & Responsibilities

- Inform WMDA about any conflict of interest before participating in any review.
- Sign the confidentiality and conflict of interest form before participating in a review.
- Be fair, unbiased, professional. Inform WMDA if the review cannot be completed in a timely fashion.
- Actively participate in at least one **on-site/remote review** together with two experienced reviewers:
 - Comprehensively and fairly evaluate a WMDA application for the assigned client
 - Register their independent findings in WMDA Share
 - Participate in the Request For Information (RFI) call together with the other members of the review team and the Accreditation Steering Committee representative
 - Review and evaluate answer(s) provided by the applicant organization.
 - Under the guidance of a team leader, audit the requirements of at least one checklist during the on-site/remote audit and fill in the checklist.
 - Review the Certification/Qualification/Accreditation Report and agree on the content with the review team.
- Complete a survey after the evaluation provide information on the evaluation process
- Destroy any review materials after the review is complete.
- Participate in WMDA continuing education for reviewers.

Requirements

- Completed L2 training and approved by the Accreditation Steering Committee representative as Trainee L3
 - o Completion of L2 training is determined by
 - Satisfactorily completing the Reviewers' Advanced Training Course (Modules 11 to 15), associated quizzes and inspection good practices exam. before participating in an on-site/remote audit
 - Achieve a satisfactory performance during a desk audit.



	Job description			
	Document type	Form-Job description	Approved by	ASC
	Document reference	F-ACC-JPE-002	Approval date	20210601
	Version	0	Pages	Page 1 of 2
	Pillar	Pillar 4-EQ – Certification Body	Status	Public



Position	WMDA Accreditation Expert Reviewer L4	Version:	00
		Valid from:	20210601


Reporting to:	Accreditation Steering Committee	WMDA Group definition	WMDA Accreditation Reviewers
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General role description

L4 WMDA Expert Reviewers participate in WMDA **desk and/or on-site/remote reviews** and also review **self-evaluations**.

Duties & Responsibilities


- Inform WMDA about any conflict of interest before participating in any review.
- Sign the Confidentiality and Conflict of interest form before participating in a review.
- Be fair, unbiased, professional; do not contact the registry under review—this is the responsibility of the office
- Inform WMDA if the review cannot be completed in a timely fashion.
- Review **self-evaluations**.
- Participate in **desk and/or on-site/remote reviews** together with the Team Leader and trainee:
 - Comprehensively and fairly evaluate a WMDA application for the assigned organization
 - Register their independent findings in WMDA Share
 - Participate in the RFI call together with the other members of the Review Team and the Accreditation Steering Committee representative
 - Review and evaluate answer(s) provided by applicant organization on the Request For Information
 - Under the guidance of the Team Leader, participate in the on-site/remote audit and fill in the assigned checklist providing information and evidences.
 - Review the Certification/Qualification/Accreditation Report and agree on the content with the Review Team
- Complete a survey after the review is complete to provide feedback on the process
- Participate together with the L5 and Accreditation Steering Committee representative in the performance evaluation of Trainee reviewers.
- Destroy any review materials after the review is complete.
- Participate in WMDA continuing education, obtaining a minimum number of credits established by ASC for each year
- Review Module 16, Changes to the WMDA Standards, Guidance, Policies and Procedures each year (mandatory module each year).
- Perform at least one review (application or self evaluation) every two years; one application review every four years.

	Job description			
	Document type	Form-Job description	Approved by	ASC
	Document reference	F-ACC-JPE-002	Approval date	20210601
	Version	0	Pages	Page 2 of 2
	Pillar	Pillar 4-EQ – Certification Body	Status	Public

Prerequisite to participate in L4

- Complete L3 training and be approved by the Accreditation Steering Committee representative as Expert Reviewer L4

Expert reviewers who have retired from their positions at a registry are eligible to continue to perform as an expert reviewer as long as they fulfill the requirements for continuing education.

	Job description			
	Document type	Form - Job description	Approved by	ASC
	Document reference	F-ACC-JPE-001	Approval date	20210601
	Version	0	Pages	Page 1 of 2
	Pillar	Pillar 4-EQ – Certification Body	Status	Public



Position	WMDA Accreditation Team Leader Reviewer L5	Version:	00
		Valid from:	20210601

Reporting to:	Accreditation Steering Committee	WMDA Group definition	WMDA Accreditation Reviewers
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General role description

L5 WMDA Team Leader reviewers lead WMDA **desk or on-site/remote inspections**. L5 are responsible to provide support and guidance to WMDA Trainees.
L5 Team Leader reviewers can also act as Expert L4 reviewers.

Duties & Responsibilities

- Inform WMDA about any conflict of interest before participating in any review.
- Sign the Confidentiality and Conflict of Interest form before participating in a review.
- Be fair, unbiased, professional. Inform WMDA if the review cannot be completed in a timely fashion
- Review **self-evaluations**.
- Lead **desk or on-site/remote reviews** and coordinate the review team.
 - Comprehensively and fairly evaluate a WMDA application for the assigned client
 - Register their independent findings in WMDA Share
 - Lead the Request For Information (RFI) call being held with the other members of the review team and the Accreditation Steering Committee representative and assist with the preparation of a consensus RFI
 - Review and evaluate answer(s) to the RFI provided by the applicant organization
 - Lead the on-site/remote audit and provide a completed version of WMDA checklists including comments from the review team to WMDA office.
 - Lead any other discussions being held by the review team and draft any subsequent consensus reports and requests
 - Assist with any further clarifications of requirements through direct contact with the applicant client with an Accreditation Steering Committee representative.
 - Draft the Certification/Qualification/Accreditation Report and agree on the content with the review team and the Accreditation Steering Committee representative. Send the final version to WMDA office.
 - Participate in Accreditation Committee meetings presenting the relevant information about the review process for making the Certification/Qualification/Accreditation decision.
 - Inform WMDA office about significant issues in the review process.
- Complete a survey after the review is complete to provide feedback about the process.
- Participate together with the L4 and Accreditation Steering Committee representative in the performance evaluation of Trainee reviewers.
- Destroy any review materials after the review is complete.
- Participate in WMDA continuing education, obtaining a minimum number of credits established by ASC for each year



	Job description			
	Document type	Form - Job description	Approved by	ASC
	Document reference	F-ACC-JPE-001	Approval date	20210601
	Version	0	Pages	Page 2 of 2
	Pillar	Pillar 4-EQ – Certification Body	Status	Public

- Review Module 16, Changes to the WMDA Standards, Guidance, Policies and Procedures each year.
- Perform at least one review (every two years; one application review every four years).
- Act as a team leader for at least one application review every two years.

Prerequisite to participate in L5

- Be a L4 Expert reviewer and
- Be approved by the Accreditation Steering Committee representative as L5
 - Team leader for qualification application: Previously participated in at least 2 qualification reviews as team member with a satisfactory performance based on a post-review surveys of the review team
 - Team leader for accreditation application: Previously participated in at least 2 desk reviews coupled with site visits (on-site or remote) with a satisfactory performance based on a post-review surveys of the review team.
 - Participated in a team leader workshop with satisfactory performance on an exam
 - And one of the following:
 - Directly participated in the preparation of an application for their own registry as a quality manager
 - Experience as auditor for another organization

Annex II – WMDA Educational Opportunities: Annual Training Plan

Target Audience	Training action	Kind of training	Objectives	Trainer	Online/On person	Date	Credits	Evaluation method	Evaluation due date
Trainees	New reviewers training course (Modules 1 to 10 + Good practices Exam)	Mandatory for new reviewers	Understanding WMDA Standards and Guidance. Enhance and refresh knowledge using WMDA online resources. Comprehensively and fairly evaluate an application for Certification/Qualification/Accreditation.	Online WMDA Educational Platform	Online WMDA Educational Platform	Continuously open from March 2021	NA	Good practices Exam	Six months from the start of the course
Trainee desk	Modules 11 to 15 + Final exam	Mandatory for desk trainee reviewers	Describe the various types of audits Understand the goals of an on-site (or remote) audit Describe what occurs during a registry audit Describe the similarities and differences between on-site and remote audits Compose appropriately worded questions to ascertain compliance during an on-site (or remote) audit Prepare a report describing audit results	Online WMDA Educational Platform	Online WMDA Educational Platform	Continuously open from March 2021	NA	Final Exam quiz	Six months from the start of the course
Experienced reviewers	Accreditation program reviewers update	Mandatory for target Audience. Highly recommended for Trainees	Understanding changes to the Standards, Guidance, Policies and Procedures, and Checklists (known as module 16)	Online WMDA Educational Platform	Online WMDA Educational Platform	Jan-21	4	Final quiz	The quiz will be open until 31 Dec 2021



Target Audience	Training action	Kind of training	Objectives	Trainer	Online/On person	Date	Credits	Evaluation method	Evaluation due date
Experienced reviewers	Annual reviewers' exam 2021	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Check and refresh knowledge about WMDA Standards and Inspections	Online WMDA Educational Platform	Online WMDA Educational Platform	Jan-21	4	Exam	Exam be open until 31 Dec 2021
Experienced reviewers/ WMDA members	RFI Top 10: Application Guidelines: Presenting Organizational Structure and Qualifications of Individuals	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	<p>Understanding requirements from WMDA Standards - Organizational structure</p> <ul style="list-style-type: none"> - How to present affiliated entities of registry - How to present organization of registry - How to present key staff - Information to include in resume / CV - How to present medical review panel expertise - How to present expert consultants/advisory panel expertise - Accounts and Finance 	Carolyn Hurley	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	14/01/2021	1	<p>Quiz in WMDA Educational platform.</p> <p>A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.</p>	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	RFI Top 10: Application Guidelines: Interactions with transplant and collection centres, donor safety	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	<p>Understanding:</p> <ul style="list-style-type: none"> - WMDA Standard 1.07 - WMDA Standard 6.02.1 - WMDA Standard 6.05 - WMDA Standards 8.05 and 8.05.2 	Marie Kurikova	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	21-Jan-21	1	<p>Quiz in WMDA Educational platform.</p> <p>A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.</p>	The quiz will be open until 31 Dec 2021



Target Audience	Training action	Kind of training	Objectives	Trainer	Online/On person	Date	Credits	Evaluation method	Evaluation due date
Experienced reviewers/ WMDA members	What does the Accreditation Steering Committee do?	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Describe the organization of the Quality Pillar Describe the roles and responsibilities of the Accreditation Steering Committee Appreciate the types of issues that the ASC addresses	Carolyn Hurley	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	28-Jan-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	RFI Top 10: Working with KPIs	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	What are KPIs How are KPIs calculated Which KPIs have been defined WMDA Standards and KPIs RFIs	Andrea Mitterschiffthaler	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	04-Feb-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	Remote Audits	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	How to prepare/evaluate a remote audit: Registry facility tour Registry file preparation File review via online screen-sharing	Janet Parks	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	11-Feb-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021



Target Audience	Training action	Kind of training	Objectives	Trainer	Online/On person	Date	Credits	Evaluation method	Evaluation due date
Experienced reviewers/ WMDA members	RFI Top 10: Quality management, SOP's and checking certification of associated entities	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Quality Management, SOP's and checking certification of associated entities	Salmah Ahmed	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	18-Feb-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	Completing an organizational profile in Share	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	How to complete Organizational profile in WMDA Share	Vasiliki Gkioka	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	25-Feb-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	Product code requirement: Changes in WMDA Guidance for standard 8.07	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Understanding the changes in WMDA Standard 8.07	Dena Mercer	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	10-Jun-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021



Target Audience	Training action	Kind of training	Objectives	Trainer	Online/On person	Date	Credits	Evaluation method	Evaluation due date
Experienced reviewers/ WMDA members	Challenges impacting Backup Donor	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Increase awareness about the impact in Backup donors	Ingrid Tistl	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	17-Jun-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021
Experienced reviewers/ WMDA members	Mechanism to ask questions or requests for clarification to the Standards Committee	Highly recommended for WMDA reviewers (all levels) to complete continuing education requirements.	Understand how to ask question-request to clarifications to WMDA Standards Benefit from the information in FAQ section about WMDA Standards.	Dena Mercer	Zoom Webinar <i>All webinars are tapped and available on WMDA Educational Platform</i>	24-Jun-21	1	Quiz in WMDA Educational platform. A minimum score of 100% is required to pass the test and receive 1 credit. There are 3 attempts to complete the test and the highest score will count.	The quiz will be open until 31 Dec 2021