Preface

Error or "occurrence" management in the laboratory is the core of continual process improvement. Errors are going to occur, like it or not. The more we admit to errors, the greater the chances of success in eliminating them and preventing others in the future. Error management requires a very well-designed process by which errors can be identified and handled effectively. That process can have many variations, yet the consistent elements typically include the following: detection, reporting, initial evaluation, any action urgently needed, an in-depth analysis of the root cause(s), notifications as required, corrective actions, preventive actions, and, finally, evaluation of the success of those actions taken.

This text provides tools and step-by-step instructions to reinforce the importance of managing the error and making the right decisions for correction and prevention. The effectiveness of the corrective action will depend on a strong informed investigation of the occurrence. This book is specifically designed for those who embrace the quality improvement concept and explores the following topics:

1. Process improvement in blood banks, transfusion services, and clinical laboratories. Many of the quality improvement resources available today address issues particular to various industries (eg, housing construction, assembly work, entertainment venues). In contrast, this book is focused on the medical laboratory environment and examples provide insight into situations encountered in blood collection and transfusion.
2. Risk assessments along the path of laboratory workflow. Likewise, the examples and scenarios detailed here focus on real-life occurrences in a medical laboratory setting.
3. Step-by-step guidance on how to implement an effective error management protocol. This resource is intended to remove the mystery that may surround error management for those who are new to the concept. Numerous tables, figures, and forms are provided in two formats—samples of completed tools using relevant scenarios and blank templates for adoption and modification.
4. Management approaches and strategies to minimize/eliminate the errors. As with error management protocols, there is no single best approach to process improvement. This book provides multiple strategies so that any facility can find one that fits its structure, scope, and operating environment.

As experienced members of the profession, we have encountered our share of errors, too. We have enjoyed assembling the guidance to help others manage the inevitable. We hope that our efforts make the road to exceptional performance a bit smoother for all.

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