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## Checklist for Customer Service and Phlebotomy

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**Introduction** Customer Service is defined as the assistance and advice provided to those members and their families who use our services.

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**Scope** This reference is intended for any front-line laboratory workers who are in direct line contact with members and their families.

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**Safety Precautions** Refer to the Safety Manual for general safety requirements.

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## Checklist for Customer Service and Phlebotomy, Continued

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### Checklist

- Ensure a clean and safe draw station.
- Clean table and computer workstation with germicidal disposable wipes per local policy.

Prior to the phlebotomy draw, practice AIDET:

- A**cknowledge the member
  - Use their preferred name as displayed in KP HealthConnect
  - Never ignore a patient if they walk into the lab. Ask how you can help them and let them know you will be with them in a minute.
- I**ntroduce yourself – use your NAME.
- H**ave your name badge visible and readable.
- F**ocus your full attention on the patient. Avoid personal conversations and distractions such as cell phones.
- D**uration – let the member know how long the wait may be.
- E**xplanation – explain to the member what is being done today.
- T**hank the member – ask: “Is there anything else that I can help you with?”
- P**lace the customer needs first.
- A**lways smile and use a pleasant tone of voice.
- U**se age appropriate greetings.
- B**e positive and honest. The correct answer is never “I don’t know”, unless you add, “but I can find out for you”.
- T**reat the customer with courtesy and respect.
- N**ever argue with the customer.
- M**ake direct eye contact and use their name.
- B**e confident, polite and friendly.
- C**ommunicate clearly.
- H**elp out where needed.
- L**isten to the customer.
- A**pologize for the wait, if needed.

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## Checklist for Customer Service and Phlebotomy, Continued

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### Checklist, Cont.

#### Phlebotomy Draw:

- All Patients must be clearly identified using two [2] identifiers:
- Labels will be verified with the patient, as per local policy.
- Ambulatory: The patient will be asked to state their full name and full date of birth.
- In-patient conscious: The patient will be asked to state their full name and date of birth. The armband is checked and compared to the information stated and to the KPPI handheld.
- In-patient unconscious: Verification is done through an adult responsible for the patient, when available. The armband is checked and compared to the information stated and to the KPPI handheld,
- All specimens will be collected in the correct order of draw.
- All tubes must be mixed by inversion the number of times required, as soon as the tube has been removed from the holder.
- Gloves must be worn and changed between patients. Wash hands or use approved antiseptic between glove changes.
- A new tourniquet will be used for each patient and will be removed from the arm after approximately one minute.
- Do not draw from the wrist side of the hand. Drawing from the back of the hand is acceptable.
- All specimens will be labeled immediately after the specimen is drawn in the presence of the patient. The labeled specimen will be shown to the patient to confirm that the correct label is on the specimen, as per local policy.
- Draws are limited to 2 [two] attempts per phlebotomy for hard draws. A second person may attempt the draw with a limit of 2 [two] attempts. Ask patient permission for additional draws after each attempt is missed. If unable to draw the blood, refer patient to a supervisor [outpatient] or nurse [inpatient] per local policy. Inpatient – after first phlebotomist misses, inform nurse of inability to draw specimen and ask for instructions.
- Draws from an arm with an IV will be performed by following the procedure “Drawing Blood from Patients with an IV”.
- Never draw blood from a shunt or from the arm where the shunt is located.
- Do not draw blood from the arm that is on the surgical side of a mastectomy unless approved by a provider’s written order.
- Do not draw from any indwelling lines. An RN must discard 10 cc of blood to avoid contamination before filling appropriate tubes.
- Transfusion Service outpatients and pre-op patients: May require an additional routing form to be completed per local process.
- All local policies and procedures will be followed.
- When a blood culture is being drawn, cholorprep preparation will be followed as stated in the “Blood Culture – Skin Preparation and Specimen Collection procedure.”

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Kaiser Permanente  
Medical Care Program  
California Division – South

SCPMG Laboratory Systems  
Preanalytical Processing  
Reference

## Checklist for Customer Service and Phlebotomy, Continued

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**Non-  
Controlled  
Documents**

- Kaiser Permanente AIDET Guidelines
  - Kaiser Permanente OCA Platinum Service Observation document
  - Kaiser Permanente South Bay Medical Center Culture of Caring Behavior
  - Internet search on “Customer Service”
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## Signature Manifest

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**Review: SBMC-PPP-0053 01 Checklist for Customer Service and Phlebotomy**

### Review

Name/Signature	Title	Date	Meaning/Reason
Janice Wolf (K119893)	Director Operations Area Lab	17 Jun 2020, 08:26:54 AM	Reviewed
Qiyamaa Portillo (K237031)	Assistant Director Operations	04 Aug 2020, 11:34:30 AM	Reviewed