

Outpatient Lab Assistant Competency Assessment

Employee Name _____ NUID _____ Date _____

Self Assessment/Validation Key

- U:** Unable to perform these tasks;
- A:** Able to perform these tasks but require additional practice/assistance;
- I:** Able to perform these tasks independently

- Initial
- Semi-Annual
- Annual

Validator: Record Competency Assessment Validation performed by

1. **Direct Observation (DO)**
2. **Monitoring and Review of Work/Records(RR)**
3. **Interactive Evaluation by Validator (INT)**

Competency	Self Assessment U, A, I	Date	Validation U, A, I	Validation Method DO, RR, INT	Validator Initials	Date
PHLEBOTOMY FUNCTIONS						
Logs into Mainframe (shared computer), Cerner or Windows (for managed computer) as directed to perform phlebotomy						
Disinfect phlebotomy area. Name badge is visible and readable.						
Greets patient in an appropriate manner, and properly identifies patient and self -introduction						
Request patient first and last name and DOB.						
Write down date of birth on printout.						
Ask patient if fasting as needed.						
Clean hands with gel and put on gloves in front of patient.						
Performs venipuncture following proper policy and procedures.						
Ask patient to apply pressure while labeling tubes.						
Apply tape and ask patient to apply pressure for 5-10-mins.						
Properly labels specimens with correct test/accesion label						
Properly disposes of sharps and other equipment						
Washes hands or uses alcohol based hand gel before and after each patient encounter						
Knows lab policy that allows maximum of two sticks per patient per phlebotomist						
Able to use LabNet to identify specimen requirements.						
Prioritizes STAT when processing incoming blood work						
Prioritizes Precious specimens (CSF, Bone Marrow, Body Fluids, Surgical Specimens) and processes immediately following Lab P&P						
Delivers specimens to appropriate department and notifies CLS of STAT or Urgent specimens						
SPECIMEN PROCESSING FUNCTIONS						
All Specimen Types: Able to use KRMS , Cerner and Health Connect to verify that all orders are completely and correctly completed for each specimen						
Non-lab collected specimens: Able to identify and complete orders from KRMS						
Non-lab collected specimens: Able to complete specimens for testing.						
Centrifuges specimens for appropriate time based on test requirements.						

Outpatient Lab Assistant Competency Assessment

Closes transportation lists as needed to assure specimens are on file.						
Processes send outs to regional lab or reference lab in a timely manner						
Follows specimen temperature and processing requirements for holding and transporting lab specimens to outside laboratories.						
Packs and labels courier totes appropriately.						
Processes Bacteriology specimens in a timely manner; Notifies CLS of specimens that require testing						
Maintains all required processing, maintenance, and communication logs						
Troubleshooting: Able to perform initial troubleshooting for problem specimens and resolve if possible.						
Troubleshooting: For problems specimens that the lab assistant cannot resolve, adequately communicates with co-worker or supervisor the issue, what has been done, and what still needs to be done to resolve.						
OTHER						
Answers phones with department name, employee name, and greeting						
Checks inventory levels and expiration dates of materials be used (processing, bacteriology)						
Stocks and maintains phlebotomy room and storage room as needed						
Places orders or notifies appropriate lead when supplies are needed, prior to running out						
Maintains all temperature and environmental logs; notifies supervisor or CLS if out of range						
Assists in training new employees as necessary						
LIS downtime process						

Comments

Lab Assistant Signature _____ Date _____

Validator Signature _____ Date _____



KAISER PERMANENTE

**VENIPUNCTURE COMPETENCY 10-080
LABORATORY ASSISTANT- (Outpatient) MOB**

EMPLOYEE NAME:		<input type="checkbox"/> Initial	YEAR
		<input type="checkbox"/> 6 months	
		<input type="checkbox"/> 1st Year	
		<input type="checkbox"/> Annual	

DIRECTIONS: The observer will evaluate the Phlebotomist for the inclusion of each of the following components. For unsatisfactory performance, leave a description and review with the employee.

S	Satisfactory performance passed competency assessment and can perform tasks independently.
U	Unsatisfactory performance, remedial training needed prior to performing tasks

	Assessment description	(S or U)	comments
1.	Greets patient with a welcoming statement and introduces him/herself.		
2.	Identifies patient: Asks the patient/parent first and last name and date of birth and records on printout. Compares response with the printed OE screen and KRMS SO screen.		
3.	Verifies orders in KRMS under SO/OE. Accessions outside laboratory orders under CO. Prints Accessioning labels and verifies information on labels with patient identification. All Information must match.		
4.	Reassures patient about the procedure Properly positions the patient: patient sitting upright with arm extended.		
5.	Assembles supplies needed for the blood draw: Alcohol swab, needle, vacutainer sleeve and needle, tourniquet and appropriate vacutainer tubes		
6.	Verifies tests ordered and tube selection is appropriate.		
7.	Properly applies the tourniquet; tight enough to partially obstruct the blood flow, but loose enough as not to discomfort the patient (should not exceed 2 minutes).		
8.	Selects an appropriate venipuncture site.		
9.	Properly cleanses venipuncture site with alcohol, allow to air dry, for a routine blood draw and with betadine for blood cultures without touching site after cleansing.		
10.	Clean gloves are donned in presence of patient. Wears gloves during the phlebotomy procedure.		
11.	Performs phlebotomy with proper technique. a) Locates vein to be used. b) Anchor vein adequately. c) Inserts needle at an angle 30 degrees or less and advances needle into vein lumen. d) Attach and change collection tubes in a smooth and orderly manner without lifting up on the skin.		

LABORATORY ASSISTANT- MOB

12.	<p>a) Collection tubes are filled in the correct order. Blood Cultures, Blue, Plain Red, SST, Green, Lavender and Gray.</p> <p>b) When using butterfly needle, and a Blue top is first, draw a discard tube Blue, with a few drops to fill the tubing.</p> <p>c) Knows fill requirements of Blue top tube, Lavender and Blood culture bottles.</p> <p>d) Invert all tubes 8-10 times to mix well.</p>		
13.	<p>Needle is removed from vein, and safety device on needle or safety button on butterfly device is activated.</p> <p>If venipuncture requires re-entry of the skin, a new needle must be used.</p> <p>A clean cotton ball is applied to site taking care not to press down on the needle.</p>		
14.	<p>Logs in all specimens with correct collection information.</p> <p>Tubes are correctly labeled in front of the patient. Accessioning labels are initialed and applied to the tubes. By initialing verifies proper identification of the patient. Slides are made if necessary.</p>		
15.	<p>Tape is applied over the cotton ball and the patient is instructed to apply pressure to the site w/o bending arm a minimum of 2 min. A farewell statement is said.</p>		
16.	<p>Sharps and other equipment are properly disposed before the next patient arrives and drawing area cleaned.</p>		
17.	<p>Knows to wash hands or use antimicrobial hand gel immediately before and after removing gloves.</p>		
18.	<p>Knows lab policy 07-072 that allows maximum two sticks on a patient per phlebotomist.</p>		
19.	<p>Centrifuges serum tubes 10 minutes at 3000 RPM after allowing them to stand upright 30 minutes to clot.</p>		
20.	<p>Spins all blood specimens needing centrifugation within 2 hours of collection.</p>		
21.	<p>Follows specimen temperature requirements for holding and transporting lab specimen. Can pack both regional and Anaheim courier boxes with specimen upright using temperature separators and ice packs as needed. Frozen specimens are package separately and labeled for appropriate performing lab.</p>		
22.	<p>Checks expiration dates of materials being used and stocks phlebotomy areas as needed.</p>		
23.	<p>Checks refrigerator and incubator temperatures and adjusts if out of range.</p>		

EMPLOYEE SIGNATURE:	DATE:
OBSERVER SIGNATURE:	DATE:
SUPERVISOR REVIEW:	DATE:



KAISER PERMANENTE

HEELSTICK COMPETENCY 10-100 LABORATORY ASSISTANT

EMPLOYEE NAME:		<input type="checkbox"/> Initial <input type="checkbox"/> 6 months <input type="checkbox"/> 1 st Year <input type="checkbox"/> Annual	YEAR
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S	Satisfactory performance passed competency assessment and can perform tasks independently.
U	Unsatisfactory performance, remedial training needed prior to performing tasks

	Assessment description	Competency (S or U)	comments
1.	Greets patient/parents and introduces him/herself.		
2.	Identifies patient: Asks the patient/parent first and last name and date of birth and records on printout. Compares response with the printed OE screen and KRMS SO screen. Prints Accessioning labels and verifies information on labels with patient identification. All Information must match.		
3.	Reassures patient/parent about the procedure.		
4.	Assembles supplies needed for the skin puncture. Alcohol swab, gauze, bandage, QwikHeel lancet and appropriate microtainer tubes.		
5.	Verifies tests ordered and tube selections are appropriate.		
6.	Wears new, properly fitting gloves, changing for each patient.		
7.	Prewarm the baby's heel with a heel warmer for about 5 minutes.		
8.	Positions the patient so that the heel is steady and supported in a comfortable position.		
9.	Grasps the baby's foot just beneath the heel.		
10.	Cleanses the entire heel with an alcohol swab and allows it to air dry.		
11.	Holds the lancet and places it firmly against the outside area of the heel and activates the retractable lancet.		
12.	Wipes away the first drop of blood.		
13.	Knows that if blood does not flow with gentle pressure, another puncture needs to be made. Knows Policy 07-072 that allows a maximum of two sticks on a patient per phlebotomist.		
14.	Always collects the hematology (purple top) specimen first, followed by the chemistry sample. Anti-coagulated tubes are mixed well.		
15.	Applies gauze with light pressure on completion of the procedure.		
16.	Disposes of the lancet in the SHARPS container.		
17.	Places a bandaid over the puncture site. To prevent a choking hazard, instruct parent to not allow child to put bandage in his/her mouth and remove bandage in 10-20 minutes.		
18.	Logs in all specimens with correct collection information. Tubes are correctly labeled in front of the patient. Accessioning labels are initialed and applied to the tubes. By initialing verifies proper identification of the patient. Slides are made if necessary.		
19.	Washes hands or uses antimicrobial hand gel immediately before and after removing gloves.		

EMPLOYEE SIGNATURE	DATE:
OBSERVER SIGNATURE	DATE:
SUPERVISOR REVIEW:	DATE:

In-service: Specimen Tracking

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

Initial when complete

- Creating Courier Tracking System Label _____
 - Creating sub tub label (ambient, refrigerated or frozen) _____
 - Adding specimens to a sub tub _____
 - Putting specimen into an inner sub tub _____
 - Shipping Outer Tub and Content _____
-

Competency assessment Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Blood Culture

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

Initial when complete

- Has read policy and procedure _____
 - Knows proper collection and site preparation _____
 - Intervals of draw _____
 - Proper documentation of collection times _____
 - Knows how to label specimen properly _____
-

Competency assessment Oral questions PASS NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Precious Specimens

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

initial when complete

Performance

- UBT Precious specimen project expectations have
 Been explained and understood
- Use of stamp and process of handing off specimens
 Has been explained and understood
- Knows who to go to if there are questions
- List other items covered:

Competency assessment: Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Sputum Specimens

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

initial when complete

Performance

- Sputum culture and Q Score expectations have
 Been explained and understood
- Use of stamp and process of handing off specimens
 Has been explained and understood
- Knows who to go to if there are questions
- List other items covered:

Competency assessment: Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Daily Maintenance and Centrifuge Operation

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

Initial when complete

Centrifuge Operation

- Proper spin times
- Proper loading
- Spills/breakage cleaned with disinfectant
- Repair requests submitted to Instrument Repair

Daily Maintenance

- Countertops cleaned with disinfectant
- Daily maintenance recorded
 - Timeclocks
 - Centrifuges
 - Inventory/Expiration dates
 - Specimen processing

Competency assessment Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Processing &/Or Mailing Non-Quest Specimens

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

initial when complete

Performance

- Knows how to look up proper specimen & shipping requirements
- Able to properly package specimens for shipping
- Able to complete Shipping Labels
- Knows who to go to if there are questions
- List other items covered:

Competency assessment: Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____

In-service: Ordering and Resulting Non-Accessioned Specimens

Employee Name: _____

Date of In-service: _____

In-service by: _____

Information covered

initial when complete

Performance

- Knows how check for non-HC orders & how to process
- Knows to make copies and where to file Orders
- When results are received, know to fax results to Provider
- Knows to send results to East Street for scanning
- List other items covered:

Competency assessment: Oral questions

PASS

NOT PASS

Supervisor review: _____

Date of review: _____