


Training, Six Month Evaluation, and Annual Competency Assessment of Central Processing Staff

	<b>DOCUMENT TYPE:</b> Procedure	<b>ORIGIN DATE:</b> 06/01/15
<b>CLIA Lab Director:</b> Dr. Gregory Pomper	<b>LAB DEPARTMENT:</b> Central Processing Lab	<b>CONTACT:</b> Central Processing Manager

**APPLICABLE LABORATORY(S):**

- North Carolina Baptist Hospital (NCBH)
- Lexington Medical Center (LMC)
- Davie Medical Center (DMC)
- Wilkes Medical Center (WMC)
- High Point Medical Center (HPMC)
- Westchester
- Clemmons

**PURPOSE**

The purpose of this procedure is to outline the timeframe and activities that should occur to ensure the training and competency of staff members in Central Processing.

**SCOPE**

This procedure applies to Central Processing Lab team members.

**DEFINITIONS**

- A. Procedure: A process or method for accomplishing a specific task or objective.
- B. WFBH Lab System: Wake Forest Baptist Lab System is a health system that includes Wake Forest Baptist Medical Center and all affiliated organizations including Wake Forest University Health Sciences (WFUHS), North Carolina Baptist Hospital (NCBH), Lexington Medical Center (LMC), Davie Medical Center (DMC), Wilkes Medical Center (WMC), High Point Medical Center (HPMC), Lab at Westchester and Lab at Clemmons.

**SUPPLIES/MATERIALS**

Use appropriate personal protective equipment (PPE) when handling biohazardous specimens.

**PROCEDURE GUIDELINES**

**A. Initial Training**

1. New employees will be trained in the three department rotation areas, Tube room, Spin, and Accessioning. Each rotation has a corresponding training checklist that the trainer will utilize during the training period. The items on the checklist detail the job duties for that rotation.

2. When the checklist is complete, the new employee will be given a competency assessment exam that corresponds to that rotation. To be considered competent in that area, a minimum score of 90 is required.
3. Any employee that does not achieve the required minimum score will be retrained in that rotation using the corresponding checklist, and will re-take the competency assessment exam. If the minimum score is not achieved at this time, evaluation will be made by the manager to assess the situation and create an action plan.

#### **B. Six Month Assessment**

1. New employees will be given a competency exam again at their six month training anniversary to make sure the knowledge is retained that was learned at initial training.
2. A minimum score of 90 is required to pass the six month exam. If any scores are below this level, the employee will need to be retrained in that rotation using the appropriate training checklist. If the employee does not achieve the minimum score after retraining, counseling with the manager will take place.

#### **C. Annual Competency**

1. Each staff member in Central Processing will undergo an annual competency assessment by direct observation and/or demonstration of skills needed to perform the duties of each rotation.
2. A checklist for annual competency will be completed for each employee by management annually.
3. Employees will be given a rating of C (competent) or N (not competent) on each skill on the checklist. Any N rating will require an action plan and reevaluation of that skill in two weeks.
4. Completed forms will be kept in employees' personnel files.

#### **LITERATURE REFERENCES**

None

#### **RELATED PROCEDURES/POLICIES IN NAVEX**

None


#### **ATTACHMENTS/LINKED DOCUMENTS IN TITLE 21**

Attachment: Central Processing Competency Assessment  
Attachment: Client Services Competency Assessment  
New Employee Checklists CP-TRAIN-0001

Biosafety Cabinet Use Training Checklist CP-TRAIN-0002  
Care Evolve Training Checklist CP-TRAIN-0003  
Fluid Specimen Handling and Processing Training Checklist CP-TRAIN-0004  
Legend Micro 21 Centrifuge Training Checklist CP-TRAIN-0006  
Sorvall ST 16 Centrifuge Training Checklist CP-TRAIN-0007  
Training Reference Handouts CP-TRAIN-0008  
New Employee Safety Checklist SAFE-FORM-0004  
PPE Training SAFE-FORM-0002

**REVISION DATES: REVIEW CHANGE SUMMARY AS REPRESENTED IN TITLE 21.**

Central Processing Competency Assessment

	<b>DOCUMENT TYPE:</b> Form	<b>ORIGIN DATE:</b> 06/01/15
<b>CLIA Lab Director:</b>  Dr. Gregory Pomper	<b>LAB DEPARTMENT:</b>  Central Processing Lab	<b>CONTACT:</b>  Central Processing Manager

Year: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Job Title: \_\_\_\_\_

Competency Skill	Rating C/N*	Method D/O	Evaluator's Initials	Date	Follow up Action Plan	Rating S/N	Method D/O	Evaluator's Initials	Date
Pre-analytical Knowledge and troubleshooting									
Specimen Triage – Stroke, ED, Cancer center, OR, PHONC									
Specimen scanning and accessioning in Beaker									
Specimen labeling									
Telephone Skills									
Patient Registration Knowledge									
Specimen distribution and aliquoting									
Spin/Specimen Processing									
Knowledge and completion of Spin and Tube Maintenance Checklists									

**C= competent N= Not Competent D= Demonstration O=Observation \* any N requires an action plan and reevaluation in two weeks**

**Action Plan:**


**Written Competency Scores:**

**Tube/Triage:** \_\_\_\_\_

**Accession:** \_\_\_\_\_

**Spin:** \_\_\_\_\_

Client Services Competency Assessment

 <b>Atrium Health</b> <b>Wake Forest Baptist</b>	<b>DOCUMENT TYPE:</b> Form	<b>ORIGIN DATE:</b> 06/01/15
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Year: \_\_\_\_\_  
 Name \_\_\_\_\_  
 Job Title: \_\_\_\_\_

Competency Skill	Rating C/N*	Method D/O*	Evaluator's initials	Date mm/dd/yy	Follow up action plan	Rating S/N	Method D//O*	Evaluator's Initials	Date mm/dd/yy
Communication Skills									
Customer Service-Phone skills									
Customer Service-face to face with lab staff/co-workers									
Quality Assurance of work									
Patient Registrations									
Problem solving- critical thinker									

\*C- Competent N- Not Competent D-Demonstration O-Observation any N will result in re-training and re-evaluation – consulting to see what further action will need to be taken

**Action Plan:**

Internal Courier Competency Assessment

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Year: \_\_\_\_\_

Name \_\_\_\_\_

Job Title: \_\_\_\_\_

Competency Skill	Rating C/N*	Method D/O*	Evaluator's initials	Date mm/dd/yy	Follow up action plan	Rating S/N	Method D//O*	Evaluator's Initials	Date mm/dd/yy
Properly identifies specimens designated for Central Processing vs. other internal labs									
Properly provides courier services on scheduled rounds to clinics.									
Customer Service-face to face with lab staff/co-workers									
Transports specimens, supplies, and reports between lab departments.									

\*C- Competent N- Not Competent D-Demonstration O-Observation any N will result in re-training and re-evaluation – consulting to see what further action will need to be taken

**Action Plan:**