



Beaumont Laboratory
Grosse Pointe • Royal Oak • Troy

COURIER TRAINING CHECKLIST

EMPLOYEE NAME	EMPLOYEE ID	HIRE DATE
BU / Department	JOB TITLE	
10136/742336	BL Courier	

PERFORMANCE EXPECTATION:

1. Observed / Discussed w/ Trainer 2. Performed with Trainer 3. Approved to Perform without Supervision / Competent

SUBJECT and RELATED TASKS / PROCEDURE STEPS	PERFORMANCE REVIEW & TRAINING SIGN OFF (Employee & Trainer: Initial and date each section)				Supervisor/Designee Sign Off - Initials and Date
	1		2		3
	Employee	Trainer	Employee	Trainer	Supervisor (or designee)
A. General information					
1. Received a New Hire Courier Packet					
2. Completed New Hire Courier Update List					
3. Location of Fire Alarm and Extinguisher					
4. Fire/Evacuation Exit Routes, meeting site					
5. Emergency Management Quick Reference					
6. Courier Staff Meetings are mandatory. Use your Outlook Mail for scheduled dates.					
7. Town Hall Meetings - Voluntary participation.					
8. Administration and Chain of Command					
9. Our Mission					
10. Annual Performance Appraisal and Evaluations					
11. Beaumont University optional classes					
12. Work Schedule/Assignment					
13. Time Clock Location					
14. Laboratory Dress Code, Badges					
15. Breakroom location, cafeteria locations					
16. Break and Meal Periods					
Sign Off and Date Section A					
B. Policies, Procedures, Forms					
1. Locate Courier Policies, Procedures (work instructions), Forms, and References Overview					
2. Where to find our forms and how to tell if a form is the most recent					
Sign Off and Date Section B					
C. ISO and Lean Quality Management					
1. ISO Quality Statement: Where is it, how it applies to Couriers					
2. ISO Quality Objectives: Where are they, what are they, how it applies to Couriers					
3. Quality Monitors for Couriers: What they are, where they are posted					
4. What are Process Improvement Plans					
5. Customer Satisfaction Surveys: Where to view results, how it applies to Couriers					
Sign Off and Date Section C					
D. PDA Operation					
1. Sign In					
2. Receive Messages					
3. Choose a Route					
4. Drop a Route					
5. Complete Car Base (start & end)					
6. Complete Vehicle Check Off List					
7. Get Inventory					
8. Add Inventory for a non-routed client					
9. Activate a client					

10	Look at client notes, directions, lock box location, client hours					
11	Get GPS Directions					
12	Add Location, Specimen P/U and Return Exceptions					
13	Deliver Supplies to Client					
14	Return Supplies to Supply Room					
15	Pick up Specimens from Client					
16	Manually Add Client to Route					
17	Drop off Specimens at Lab and other Drop Off					
18	View Route Summary Page and understand each item					
19	Complete a Route					
	Sign Off and Date Section D					
E. PDA Maintenance						
1.	Location where PDA are kept					
2.	How to use PDA and how to communicate with dispatcher					
3.	Properly place in charging cradle and identify PDA is charging					
4.	Identify if Phone is on and proper reboot procedure					
5.	Properly connect and disconnect PDA from car					
6.	What to do if PDA needs repair					
7.	Where to look for replacement PDA					
	Sign Off and Date Section E					
F. Laboratory Vehicles						
1.	Where Vehicle keys are kept					
2.	Where spare keys are located and what to do if needed					
3.	Where Vehicles are parked					
4.	Location of Gas Card, Vehicle Insurance, Registration and Accident Forms.					
5.	What to do in case of vehicle accident or breakdown					
6.	How to fill out slip for Vehicle Maintenance					
	Sign Off and Date Section F					
G. Laboratory Locations						
1.	RO Laboratory Specimen Processing					
2.	Troy Laboratory Specimen Processing					
3.	Grosse Pointe Laboratory Specimen Processing					
4.	Farmington Hills Specimen Processing					
5.	Dearborn Specimen Processing					
6.	Trenotn, Taylor, Wayne Specimen Processing					
	Sign Off and Date Section G					
H. Outlook						
1.	How to access Outlook					
2.	How to use address book					
3.	How to set up or utilize groups					
4.	How to manage mail folders					
5.	How to utilize calendar and send appointments					
6.	How to set an away message					
	Sign Off and Date Section H					
I. Specimen Pickups-What to Do						
1.	You cannot find a client's office?					
2.	You cannot find a client's lock box or pickup location?					
3.	If specimens are expected, but lockbox is empty?					
4.	If specimens are found in location other than normal?					
5.	If specimens from another lab are found in lockbox?					
6.	Specimens do not have a BL requisition?					
7.	You drop and break a specimen?					
8.	A specimen is leaking?					
9.	Proper procedure for picking up a frozen specimen?					
10.	Proper procedure for picking up a STAT specimen?					
	Sign Off and Date Section I					

FINAL SIGN OFF and APPROVAL FOR ROUTINE SCHEDULING

EMPLOYEE: <i>I have been oriented to the policies and procedures indicated above. I have noted any comments in the area provided. I understand that I am to be held accountable for all items signed off. I am responsible to follow all policies and procedures as stated in the manuals according to the listed abbreviation and am responsible for any updates that may from time to time be implemented.</i>

Employee Name and Signature

Date

SUPERVISOR (or DESIGNEE): <i>I have reviewed this employee's orientation and training. I have determined the employee to be competent in the areas signed off and therefore recommend that the employee be cleared for regular work assignment.</i>
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Supervisor (or Designee) Name and Signature
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Date
