

A Day in the Life

**Of a Mobile
Phlebotomist**

The Daily Routine

- Calls coordinator to start or clocks in at office
- Arrive Client #1 and calls Coordinator
- GREETs The CUSTOMER!!! Smiles!
- (Phlebotomist is the number one marketing representative of our company)
- Asks for a midnight census to find the correct room number

Getting it right from the Start

- Patient is identified according to the newest Patient ID SOP Update.
- Labeling- New College of American Pathology (CAP) Requirement.
- Approximately 47 specimens are mislabeled every month according to BBPL CQI data.

To Correctly Label a Specimen

- Name of Patient as listed on the requisition
- DOB of the patient
- Date of Collection (DOC)
- Time of Collection (TOC)
- Tech number or initials of the person collecting the specimen.
- All must be present and in this order

- Records information at bedside on travel log
- Centrifuges – Goal is to have serum off the cells within **2 hours**
- Checks refrigerator- still logs if none present
- Prints manifest and compares that all patients have been drawn and pick ups collected – if not, repeats above steps
- Checks manifest again

Ending with Customer Service....

Leaves second copy of travel log for the nurse in the BBPL log book.

Leaves client with a SMILE.

Best and most important sales person the client knows.....

is the phlebotomist that comes every day.

How many times do we do this?

- Next stop – call coordinator upon arrival and we repeat all of the same step as we did at client #1.
- Calls coordinator when finished with last client to see if any additional call in requests for service is needed.
- Comes back to LTC site and follows the processing procedures.

QC Process

All employees bringing back specimens go through the:

- Google Maps or Map Quest Procedure
 - Processing Procedure
 - QC Procedure
 - **Check out Procedure**

Failure to do so....

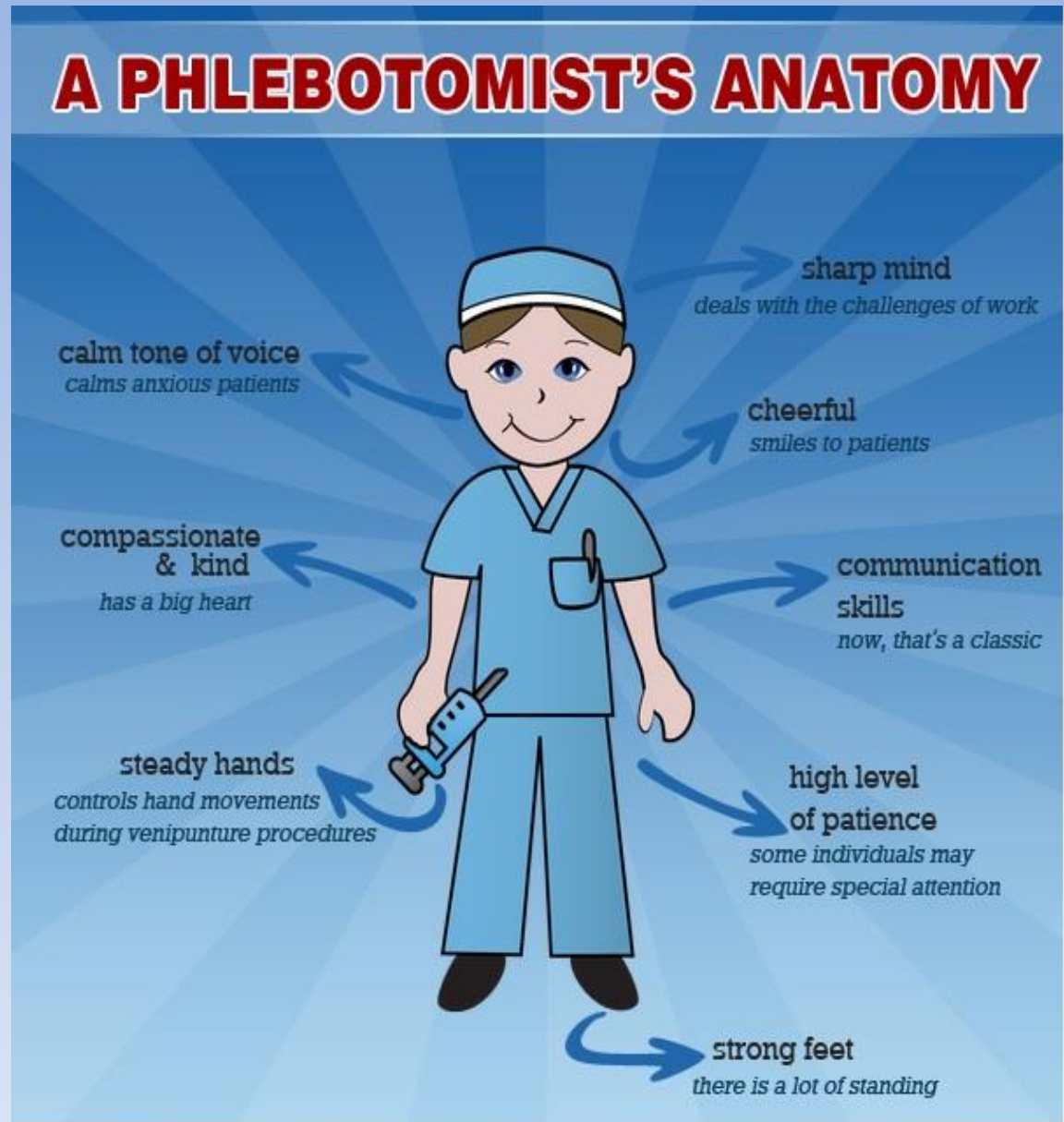
- Delay in resulting for patient and their treatment
- Poor client relations
- Increases CQI errors to monitor and to correct with corrective action.

A PHLEBOTOMIST'S ANATOMY

Skill Sets Defined

BBPL has several different levels of mobile phlebotomy ranging from Phlebotomist I –III. Each of the three levels has the same skill set as a phlebotomist I but the expectations and skill set builds as the phlebotomist progresses with their training and job descriptions.

All phlebotomist must have these character traits to be successful for our company.





AM Coordinator

Responsibilities of Coordinator

- Acts as team member with a lighter route
- Takes client calls and routes add on calls and expedites
- Takes phleb calls
- Moves team to safely
H-U-S-T-L-E!
- Liaison for team to troubleshoot problems
- Runs the processing room by delegation.
- Works closely with Supervisor
- Promotes a work safe environment

**PSC
Coordinator
or WIP**



PSC Coordinator / WIP

- Answers phone lines between high volume call time.
- Daily Management Reports
- Data Entry
- Billing inquiries
- Helps in processing as directed by Coordinator during processing rush
- Assists with QC process
- Acts as an emergency phlebotomist

Supervisor



What makes a GREAT Supervisor?

Great communication skills: As a supervisor one must communicate clearly and correctly to avoid misunderstandings and frustrations. When receiving information from a subordinate, he/she should be sure to receive it correctly – There is no harm in asking again if necessary.

Adapt to the changes: World is changing at a fast pace. The efficient supervisors ought to keep up with it. Do not just blindly follow the age old norms and rules. Think out of the box if required. Adjust to the needs of the organization.

Values the employees: The people are any supervisor's real asset. They are ones running the business and the work. A good supervisor understands their worth and treats them accordingly.

A coacher/mentor: Share your experience. A good supervisor shares her wisdom, knowledge and experience with the employees. She helps them perform better. This also strengthens the bond and the trust between them.

Disciplined: If a supervisor is disciplined then only can she expect the people to be so. The boss is an example – Come on time, meet the time-lines, set a behavioral code if necessary.

Feedback/incentives: Promotions, feedback, raises and accolades should be showered on the deserving people.

Praise is free and the most valued by an employee.

Be an example: Be hands on – Do not just always delegate. At times the boss should take on projects too. She may try picking up something less attractive or uninteresting and complete it wonderfully. This sets an example to all the team about taking up challenges and about how any work is important.

Be approachable: The employees should not hesitate in approaching the supervisor with their concerns and problems. An efficient supervisor will make sure that there is enough trust and openness between her and the employees for the latter to come to her with their grievances

Be considerate: People are not just employees. They have families, friends and a life beyond work. Unless there is something urgent, do not make them work beyond the usual hours. Let them have their weekends and vacations. Be practical when setting the time-lines. This will in turn improve the efficiency and the productivity of the employees.

The same goes for schedules.....they should have prior to leaving for the week or wait until Monday morning

Positive attitude: Be polite. Wish employees good mornings and be generous in thanking them. Inquire after about their families off and on.

Criticize constructively: When mistakes happen a good supervisor tries and understands the reasons behind the mishap. She criticizes or assesses the employee in proportion to the mistake. And it is always better to not to scream or scold in front of the others. Give constructive feedback; show them the right way to do things

So what is a BBPL
LTC Supervisor?

Supervisors.....

- Complete the team

By bringing it all together

Supervisors...

- Train
- Mentor
- Keep everyone on track
- Liaison of your site to client and your site to Central Lab.
- You ARE the LTC hub and the reason for its SUCCESS!

Supervisors...

Lower the Cost and are good steward of:

- Supplies
- Mileage
- Overtime

Supervisors...

Manage CQI by:

Receiving and processing of errors

Providing constructive corrective action

Teach ...Teach and Teach again

Mentor the correct way to do the task

Follow up on corrective action

Record the corrective action

Supervisors...

- Are responsible for weekly schedules of clients
- Provide a path for employee to take PTO
- Schedule according to Medicare guidelines

ORDERING

- Smart Business
- Fisher /Cardnial
- BBPL

Supervisors...

- Responsible for receiving DMR for designated staff or keeping it themselves.
- Transferring information to a Weekly Supervisor report.
- Uses the above information to manage and control overtime.

Supervisors...

- Assist client support in selling BBPL to the clients
- Work side by side with the client support representative to retain and grow your client base

Supervisors....

Drives the following:

Hiring Process

Onboarding Process

90 day Performance Appraisals

Yearly Performance Appraisals

Discipline as needed

Supervisors Set Goals

- Goals for the team
- Goals for the clients
- Goals for yourself

- What are your goals...?

Finally....Supervisors-

- Back fill as needed.

Because we can do all tasks of those below us and are part of the team first and foremost.

We are Leaders

Leaders Don't Force
People To Follow,
They Invite Them On A
Journey

Charles Lauer

Hiring for BBPL

Where to Start?

Metrics

- Metrics are derived from your DMR and your monthly supervisor report.
- Metrics along with the hours paid are put into a calculation to determine if you truly need an additional employee prior to the hiring process.
- While other values are put in the consideration at times, the answer to the metrics decides if we can hire additional staff.

What is my metric?

- The goal is to have 275 requisition count per FTE (full time employee) based on the hours paid of actual work.
- This is why it is so important to have all of your reports kept up and timely. Failure to have this information delays being able to move forward in the hiring process.

What if metrics say I can't hire?

- This is almost always the case of mismanagement of FTEs in the allocated work spaces on your schedule.
- Ask your Operation person to help you look at your schedule. Perhaps, an employee's hours need to be moved to accommodate better coverage.
- Look at your work volume per FTE. Who is not pulling their weight? This is why the DMR was developed.

If I can Hire...

- It starts with a staffing requisition!
- Fill it out and send it to your Operation Manager.
- The Operation Manager will have to approve and send on to Director of Operations.
- The Director of LTC will have to approve and send to Director of Human Resources.
- Human Resources sends it to the General Manager

But....I just need to get to here...NOW!



Once the staffing requisition is approved

- HR will post the advertisement on several sites where applicants will be directed to our online application.
- HR will receive and review applications and place them on our ADP website queue for you to view.

The First Step



- Once you have reviewed the application and want to move forward....you need to call and do a phone interview with the applicant.
- If you do not want to move forward.....you will simply indicate on the web site why you do not want to interview this applicant.

Listening.....perfect it or be sorry

- Phone interviews are brief to determine if you are going to invest your time any further with this person.
- Any red flags such as poor manners when they answered?
- If they knew the time of the phone interview....did they prepare the background to do a phone interview?
- Do they answer questions appropriately? How are their listening skills?

Do you like what you are hearing?

- No → Nothing further is needed other than coding the application on the ADP website.
- Yes → Tell the applicant you are interested in moving forward and will have HR contact them to send them to our Forecaster Screening Process.

Forecaster Screening

BBPL has a pre-set a determine benchmark of where we want our applicants to fall.

The forecaster is a online screening that has 2 parts:

Personality -The applicant just needs to take a deep breath and answer honestly.

Cognitive- A short 6 minute test testing basic skills of the applicant.



Test Results



- If the applicant falls within our benchmarks...we can move forward with calling the applicant for an in-person interview.
- If HR says the applicant did not pass the screening, HR will send the applicant a letter thanking them for applying to BBPL.

The interview

- Ask HR for up to date interviewing questions
- Make sure YOU are available and on time for the applicant
- Set the stage...what are you expecting out of the applicants should they be hired?
- Set the upspoken stage as well....what you represent is what you will get. If you are laid back and show indifference, expect only half of that energy from the applicant once they are hired.

Check References

- Many times we cannot get more than a person worked at a previous job however; try some back doors for insightful information such as; calling the bench tech at the lab where the person worked instead of HR.
- What kind of references did the applicant give you? A professional one or a friend who will never say anything bad about them?

So you are going to choose this one!

- Obtain an offer letter from HR. HR sets the pay scale but if you feel the applicant is worth more....talk to your Operations Manager.
- Call the applicant and tell them you have an offer for them! Be excited that they are about to come on board with your team!
- Set a time for the applicant to come in to sign the offer letter.

Once they are there.....

- They will need to sign the offer letter. An HR team member will sign for BBPL.
- Have the applicant fill out the background form.
- Get a copy of the applicant's drivers' license.
- Either send the applicant for a drug screen at a designated collection center, or collect the drug screen yourself if you have been trained.

Now, Wait for itwait for it..!

HR Department WILL call you when Everything is back and you can start your new employee.



This is what you were waiting on...

HR will notify you when the:

- ✓ Drug Screen
- ✓ Driver License check
- ✓ Background
- ✓ And in some states the EDL check

Are all back and HR is satisfied with the results.

Then *and only then* can your new person start!



**ONBOARDING
NEW EMPLOYEES!**

This is no Mickey Mouse Operation!

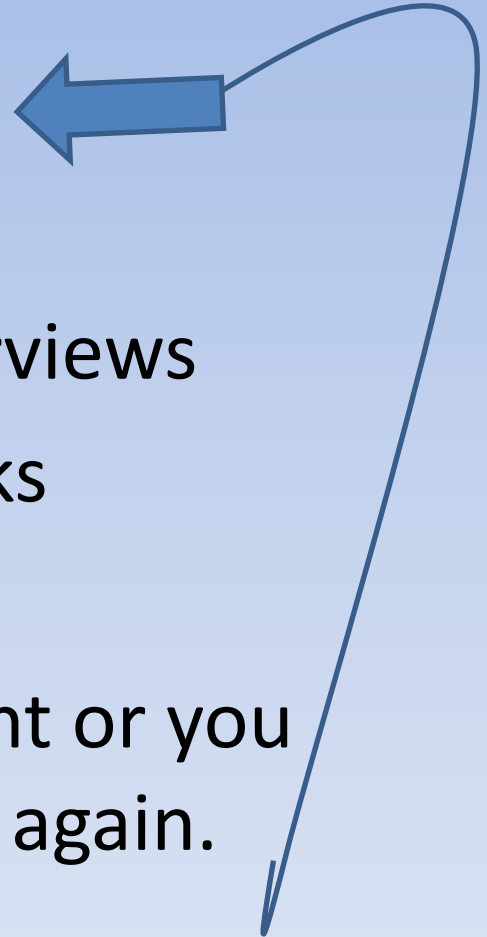


- Now is the time to get it right for the future or just hang it up!
- Why waste your time and get a poor result?
- If you are not going to train them right **why**.....did you put the time in to hire them?

So we exhausted ourselves....

- Doing the phone interviews
- Sending applicants for testing
- Sat through a lot of “No Way” interviews
- Waited for those background checks

SO remember....get this next part right or you will have to go back and do all of this again.



Day 1

- First things first!
- Have your employee be there at 0800 hours.
- Fill out any new hire paperwork. (Not the medical benefits paperwork.)
- Get that I-9 done!!!
- Fax ALL of this information to HR and send the hard copies by inner office mail on your next courier.

Day 1continued

- The ideal day to start your new employee is on a Wednesday for BBPL orientation. You will be directed to a video conference to join the Central Lab where HR will be the host.
- HR goes over benefits and answers any questions about the paperwork.
- They will get all of the HIPAA, Safety, Work Comp, Sexual Harassment out of the way.
- Please provide a lunch for your new employee. (It would be nice if you and the coordinator ate lunch with them to build that relationship.)
- Take their picture and send it to HR for their badge.

BBPL Orientation

- Is from 0900-1300 and that includes the lunch time as well.
- Make sure before orientation started you have given you new employee the medical benefit paperwork packet.

Now you get to train the Good Stuff!

- Your applicant will move through the SOP sections and MTS training in a specific order. The orientation module is currently under construction and will be out shortly.



Day 2

- Continue with SOP and MTS training.
- Have the employee shadow processing.
- Teach BBPL website.

Day 3

- Your employee should be almost done with any SOP content or MTS content.
- They should be gowned in processing today and helping you prep samples for processing and transport.
- Continue with BBPL web training.
- Have field trainer meet with employee to make plans where they will meet on Monday.

Day 4

- It's Monday!
- The new employee is shadowing the trainer.
- Trainer is explaining paperwork.
- By the second home the new employee is starting to do the paperwork. Trainer is checking over every move to make sure all is correct. Ideally this route is a lighter route so the trainer has time to train.

Day 5-8 continued

- On the second day or when the trainer feels the new employee is ready, the new employee will start phlebotomy procedures.
- The trainer is to NOT leave the new employee as the trainer will be responsible for all errors at this time of orientation.

Day 4-8 continued

- When the trainer has assessed the new employee to be fully competent and has signed off on the training paperwork the new employee will be given a hall to do while the trainer will take another hall in the same home. This will continue until the trainer feels that new employee is proficient.

Day 4-8 continued

- The trainer will have the employee navigating the BBPL web system at the client's facility.
- The training will continue back at the office as the trainer will direct them in the proper flow of the processing room and the re-stocking requirements.

Every day during orientation

- The Supervisor- let me repeat....The Supervisor is talking with the new employee about what they have learned in their training and determining if they have questions.
- This must happen each and every day. Only if the Supervisor is on PTO should the coordinator take this responsibility. This is most crucial in retaining an employee

It's a new week!

- The employee has been trained to THE ROUTE THEY WILL BE ASSIGNED.

More times than naught, in many exit interviews, I see that the employee was thrown into a new home that they never trained at on day 1-8. This leaves an employee scared, confused, frustrated and just bitter that you do not care about them or your clients.

The remainder of the first 30 days...

- The new employee is now on their own route , you have assigned a “buddy” and give phone number to each to call should small questions arise.
- A buddy is fully competent phlebotomist usually of same level. You are responsible for making sure this buddy is fully competent.
- Each and every day for the remainder of the scheduled 30 days, you will meet with the new employee at the end of their shift.

What are you talking about with them?

- How are you doing with the hours?
- How was the route today?
- Tell me what you have concerns about?

What are you talking about with them?

- How are you doing with the hours?
- How was the route today?
- Tell me what you have concerns about?
- How was your relationship with the trainer?
- Describe your encounter with the nurses at the client.
- What interaction have you had with your buddy?

And perhaps.....

- What can I do for you to help you feel more at ease with your position?
- How can I help you be more successful?
- Travel logs are reviewed closely with the employee.

2nd Month

- Meet with the new employee every week without fail.
- Review their performance and any CQI issues
- Review travel logs for the week prior
- Ask questions and ask what questions they have.
- Does any re-training need to be addressed?

3rd Month

- The new employee should really be grooved in now to their route and are ready to take on any additional homes they are assigned should one be added.
- Has been trained or is being trained on holiday and weekend rotation and it's responsibilities.
- Can take client calls for request of service and disseminate the information as needed.

3rd Month

- You have a really, really good grasp on this employee's behavior, attitude, aptitude, skill set and willingness to follow BBPL policies and procedures.
- You are still talking every week to the employee without fail.

90 day review

- Success!!! You have completely and confidently trained your new employee and they are a fully functional part of your team.
- Complete a 90 day Performance Appraisal form found on the BBPL Web.
- Have a meeting with the employee, go over the form, set any other expectations and send the form to HR. Do not forget to ask questions.

But what if they are not cutting it?

- Today at 90 days should not be a surprise! HR will be surprised if you are surprised!
- During all of these meetings with the employee you have guided them through their concerns or shortcomings.

Not cutting it....

- The employee should have had a Performance Improvement Plan in progress during this time.
- You should have documentation that you have re-trained and re-directed the employee
- You call your Operations team member to let them knowthis just isn't going to happen.

For those that don't make it....

We invite them to their future and wish them well.

HR will direct this ending of their employment.



And Finally....

Supervisors get to do the Performance Appraisal for the employees.

Besides the 90 Day Review, Performance Appraisal (aka PA) are to be done annually.

Performance Appraisals

PLAN

AHEAD

Do some back end work

In **March** – start collecting data such as:

- ✓ What was the PTOS vs PTOU ratio?
- ✓ Search for any past issues over the year.
- ✓ Go back over the shadow file...did you drop a note in it whether it be good or bad?
- ✓ Review the PA from last year....did they meet their goals? Why or Why not?

APRIL

Mark it on your calendar!

April 1st – 14th

- Write your PAs
- Set realistic but stretch goals for each employee.
- Be fair and consistent in your evaluation of each and every employee.
- DO NOT sign the PA at this time.

DUE DATE!

April 15th

- Your PAs are due to your Operation Manager for review

Ask If You Have Questions

At anytime during the process of writing a PA, especially if this is your first time, ask for input and guidance from either HR or your Operation Manager.



Operation Manager

- Will review all of the PAs you have written.
- Will give advice and give constructive criticism.
- May have you change or add content to support your view of why you assessed the employee in the way you did.

From the OPS Manager

- Director of Human Resources will review each PA for our company.
- Be prepared to answer any questions that has not been asked by your Operation Manager.
- After review and approval, HR will return PAs to Operation Manager.
- Operation Manager returns PA to Supervisor.

By this time.....

About 6 weeks has gone by



June 1st

We have all awaited this date! Finally, you are going to set a time to talk with your employee.



Is this unexplored territory for you?

If so, your Operation Manager will complete the first ones with you so you can learn the DO's and DON'Ts of giving a Performance Appraisal.

Hint: Even if it is not your first time....take time to learn something new. Never....stop learning.

Merit Based

Performance Appraisals are a really big deal since our annual raise increases are based on merit increases.

That is why it was so important for you to gather everything on your employee. Your employee is really counting on you to complete it to the best of your ability.

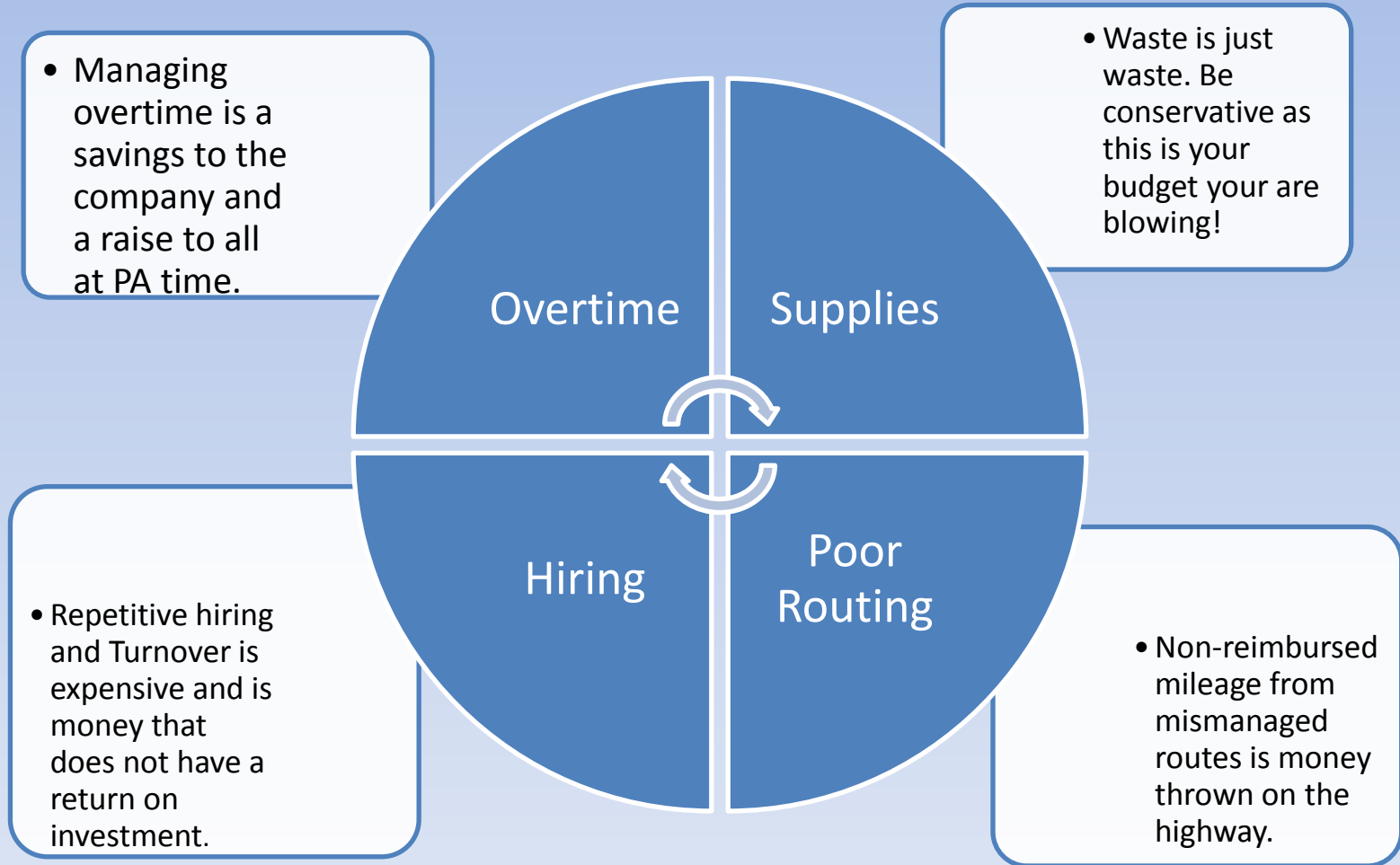
We are looking for the ROCK STARS!



After reviewing each section of the PA with your employee, the supervisor will be delivering a score to the employee which is calculated by how far the employee is saturated in their current salary range to give them their final score.

Their final score is configured into the available funds allotted for pay raises.

Remember when I said everything comes full circle in the end?



Take Action!

- A Supervisor is a good steward of money.
- You are in charge of these funds and should want to allocate these funds for the Rock Stars (like yourself) instead of throwing it all away.



The supervisor, is the leader of all and what it represents. You wear the title of your PSC or Processing Center.

You...are a reflection of your success *and* you are a reflection of those you have trained.

Today, someone needs you to do the right thing and they are waiting for you and your team to help them get the most accurate lab work to which they are entitled.

Today, you can make the difference of a life time.