

**TRAINING UPDATE**

**Lab Location:** SGMC and WAH      **Date Implemented:** 8.15.2017  
**Department:** Phlebotomy      **Due Date:** 9.11.2017

**DESCRIPTION OF PROCEDURE REVISION**

**Name of procedure:**

In-Charge Duties  
In-Charge Duties Checklist, Field Operations

**Description of change(s):**

1. New form to outline responsibilities for the group lead or person designated as the representative in charge.
2. The group lead/rep in charge does not have to complete all duties. This person ensures the duties get done and maintains the authority to delegate tasks to other staff members.

**Electronic Document Control System**



**Document No.:** SGAH.P972[0]

**Title:** In-Charge Duties

**Owner:** LESLIE BARRETT

**Status** INWORKS

**Effective Date:** 14-Sep-2017

**Next Review Date:**

Non-Technical SOP

<b>Title</b>	<b>In-Charge Duties</b>	
<b>Prepared by</b>	Stephanie Codina	<b>Date:</b> 8/9/2017
<b>Owner</b>	Stephanie Codina	<b>Date:</b> 8/9/2017

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
<b>Local Issue Date:</b>		<b>Local Effective Date:</b>

<b>Review:</b>		
<b>Print Name</b>	<b>Signature</b>	<b>Date</b>

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Form revised 3/31/00

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- 1. PURPOSE**  
 To define the routine duties for which the group lead or designee is responsible.
- 2. SCOPE**  
 This procedure applies to field operations group leads and those designated as representative in charge.
- 3. RESPONSIBILITY**  
 Group leads and designees must understand and adhere to this procedure when completing routine duties.
- 4. DEFINITIONS**  
 None
- 5. PROCEDURE**

Step	Action
1	The group lead is responsible for ensuring completion of routine tasks required in the Field Operations departments (phlebotomy, client services, and processing). The group lead maintains the authority to delegate tasks to other trained staff members and is not required to complete all tasks by his/herself. <ul style="list-style-type: none"> <li>A. A representative in-charge will be designated on shifts that do not have a group lead scheduled. The designee will be responsible for ensuring completion of the daily duties for the shift.</li> <li>B. The supervisor/manager of the department will be responsible for ensuring weekly and monthly tasks get completed in the absence of a group lead.</li> </ul>

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Step	Action
2	The group lead/designee will: <ul style="list-style-type: none"> <li>A. Monitor work flow and move staff to the workload as appropriate.</li> <li>B. Efficiently schedule staff meals and breaks to minimize impact on workflow.</li> <li>C. Monitor the processes of the departments and notify the supervisor/manager if issues are noted.</li> <li>D. Communicate pertinent information to staff and incoming shifts.</li> </ul>

**Daily Duties**

Step	Action
1	Pull unreceived logs at designated times and reconcile per procedure.
2	Pull pending logs at designated times and reconcile per procedure.
3	Ensure that all incoming supplies are logged and stored per procedure. Visually inspect supply inventory and notify supervisor if any supply is low. Rotate supplies to ensure those with the earliest expiration dates are used first to minimize waste.
4	Load and unload the ScrubEx labcoat machine. Ensure an adequate supply of labcoats is available for incoming staff.
5	Ensure temperature and centrifuge checks are logged and within acceptable range. Assist with corrective actions for any temperature that is out of range.
6	Collect phlebotomy workload and butterfly log sheets from staff at the end of the shift and forward to the supervisor/manager.
7	Complete special projects and tasks as assigned by the management team. Shift or cover staffing to accommodate staff members who have been asked to complete special projects or training/competency as workload permits.

**Weekly Duties**

Step	Action
1	Secure butterfly needles in the locker for weekend and holiday use. Approximately 200 butterfly sets are needed per day (multiply 200 x the number of days for which you are stocking). The butterfly needles will be allotted by shift and location: <ul style="list-style-type: none"> <li>• Dayshift phlebotomy = 100/day</li> <li>• Evening shift phlebotomy = 50/day</li> <li>• Night shift phlebotomy = 25/day</li> <li>• Outpatient lab = 25/day</li> </ul>

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Step	Action
2	Review temperature and centrifuges maintenance logs to ensure all values have been recorded and are within the acceptable range. Ensure corrective action is documented if a value fell outside of the acceptable range. Document omissions or failures on a quality variance form and forward to the supervisor for follow up. Sign review on each log.
3	Review the schedule for the current and next week to ensure all critical openings are filled. Print and post the weekly schedule on Friday of the previous week. Ensure overtime is not scheduled unless approved. Notify the supervisor if you note issues that cannot be resolved.

**Monthly Duties**

Step	Action
1	Perform collection tube expiration audits for hospital and off-site locations. Complete audit forms and file for supervisor review.
2	Facilitate boxing and sending records to Iron Mountain for offsite storage.

**5. RELATED DOCUMENTS**

- SOP: Unreceived Specimen List for Phlebotomist Collections
- SOP: Pending Log for Nurse Collected Specimens
- Form: In-Charge Duties Checklist (AG.F393)

**6. REFERENCES**

**7. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By

**8. ADDENDA AND APPENDICES**

None

Form revised 3/31/00

**Electronic Document Control System**



**Document No.:** AG.F.393[0]

**Title:** In-Charge Duties Checklist, Field Operations

**Owner:** LESLIE BARRETT

**Status** INWORKS

**Effective Date:** 14-Sep-2017

**Next Review Date:**



Month: _____	Year: _____
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- Shady Grove Medical Center
- Washington Adventist Hospital

**In-Charge Duties Checklist**  
Field Operations

Initial box to indicate task was completed Mark "NA" if task is not applicable	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
<b>Daily Duties—Dayshift</b>																																			
<input type="checkbox"/> Unreceived Logs—Hospital (7a, 9a, 11:30a, 1p)																																			
<input type="checkbox"/> Unreceived Logs—Off Sites (7a, 8a (ARH), 9a (ABH))																																			
<input type="checkbox"/> Pending Logs—Hospital (9a, 11a, 12:45p)																																			
<input type="checkbox"/> Pending Logs—Off Sites (10a, 12:30p)																																			
<input type="checkbox"/> Supplies																																			
<input type="checkbox"/> ScrubEx Labcoat Machine																																			
<input type="checkbox"/> Temperature Checks																																			
<input type="checkbox"/> Centrifuge Checks																																			
<b>Daily Duties—Evening Shift</b>																																			
<input type="checkbox"/> Unreceived Logs—Hospital (1:30p, 3p, 6:30p, 9p)																																			
<input type="checkbox"/> Unreceived Logs—Off Sites (3p (ABH), 5p (ARH), 9p (ARH))																																			
<input type="checkbox"/> Pending Logs—Hospital (3p, 6p, 9p)																																			
<input type="checkbox"/> Pending Logs—Off Sites (5p, 8:30p)																																			
<input type="checkbox"/> Supplies																																			
<input type="checkbox"/> ScrubEx Labcoat Machine																																			
<b>Daily Duties—Night Shift</b>																																			
<input type="checkbox"/> Unreceived Logs—Hospital (10p, 12a, 1a, 2:30a)																																			
<input type="checkbox"/> Unreceived Logs—Off Sites (12a)																																			
<input type="checkbox"/> Pending Logs (11p, 2:30a)																																			
<input type="checkbox"/> Supplies																																			
<input type="checkbox"/> ScrubEx Labcoat Machine																																			
<b>Weekly Duties (Group Lead)</b>																																			
Butterfly weekend stock up	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:			
Weekly review—centrifuges	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:			
Weekly review—refrigerators	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:			
Verify schedule for adequate staffing	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:	Date:	Rep:			
<b>Monthly Duties (Group Lead)</b>																																			
Tube Expiration Audit	Date:	Rep:	Comments:																																
Iron Mountain	Date:	Rep:	Comments:																																

Reviewed by: \_\_\_\_\_ Date: \_\_\_\_\_