

LABORATORY SERVICES - PERSONNEL TRAINING CHECKLIST

Phlebotomy – Finger Stick

☐ INITIAL ☐ SEMI-ANNUAL ☐ ANNUAL ☐ REMEDIAL

Employee Name: _____ Training Start Date: _____

Lab/Staff Position: _____ Training End Date: _____

Task Performed	Employee Initials and Date	Skill Assessment
Read PSC.01.01 Patient Identification and Specimen Labeling, PSC.02.01 Onsite Lab Patient Management Workflow, and PSC03.01 Collection of Blood Specimen		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Identify patient according to PSC.01.01 Patient Identification and Specimen Labeling.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Manage patient according to PSC.02.01 Onsite Lab Patient Management Workflow.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Follow steps 1-4 as outlined in PSC03.01 Blood Collection by Venipuncture.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Assemble collection supplies		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Have the patient sit in the phlebotomy chair and raise or lower the chair arm accordingly.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Have the patient hold right or left elbow at side and rest hand on the chair arm, palm up.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Don Gloves		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Select a collection site on the fingertips off to the side of the palm-side-surface.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Warm the site to increase blood flow.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Clean puncture site with alcohol pad and allow to air dry.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Support and hold finger with a moderately firm grip.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Make a 2-3mm deep puncture with a disposable lancet.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Wipe away the first drop of blood with the gauze pad which tends to contain excess tissue fluid which may cause erroneous results.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Lower the hand to allow the blood to drip directly into the Microcontainer or onto the strip.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Once Microcainer has been filled, cap, rotate and invert the tube 20 times to thoroughly mix the additive and ensure that it dissolves in the blood completely.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Have the patient hold a small gauze pad over the puncture site for a few minutes to stop bleeding.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent

Task Performed	Employee Initials and Date	Skill Assessment
Dispose of contaminated materials/supplies in appropriate sharps/biohazard container.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Assess patient post phlebotomy state and label specimen tubes according to PSC01.01 Patient Identification and Specimen Labeling.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent
Complete patient management according to PSC.02.01 Onsite Lab Patient Management Workflow.		<input type="checkbox"/> Competent <input type="checkbox"/> Not Competent

This employee has been assessed/trained on the above test procedures and skills and has been determined to be competent to perform tests and procedures stated above. Each staff member must demonstrate minimum qualifications as set forth by CLIA'88 Established protocols and procedures are provided and will be followed by laboratory staff for insurance of safety and quality of patient care.

Comments: _____

Employee Signature: _____ Date: _____

Trainer Signature: _____ Date: _____

Lab Director: _____ Date: _____