

**Health First Surrey
30 Anyards Road
Cobham
KT11 2LA**

6-Month Competency
 Annual Competency

COMPETENCY ASSESSMENT of PHLEBOTOMIST

Phlebotomist: CAROL ANN NICHOLS Date of Employment: September 1st 2022
Date of Evaluation: Sept 1st 2024.

Evaluate the phlebotomist on performance of venipuncture and other testing-related functions (according to the overall categories listed below) with a grade of "S" (Satisfactory) or "U" (Unsatisfactory). Place a check mark next to the function observed of discussed. If an Unsatisfactory rating is given for any category, please also place a "U" next to the specific function that needs improvement. Phlebotomists who rate an 'Unsatisfactory' rating in any category will be placed on immediate supervisory direct observation/review for a period of time sufficient to retrain them and until such time that the Phlebotomist rates 'Satisfactory' in all categories.

- a. PERTINENT ANATOMY AND PHYSIOLOGY
 - Knowledge of selecting the best vein and site
- b. CHOICE OF EQUIPMENT
 - Appropriate selection of equipment
 - Knowledge of appropriate tubes to use
- c. PROPER TECHNIQUES

<u> </u> <input checked="" type="checkbox"/> Arm band name verification	<u> </u> <input checked="" type="checkbox"/> Cleansing site	<u> </u> <input checked="" type="checkbox"/> Equipment Usage
<u> </u> <input checked="" type="checkbox"/> Tourniquet application	<u> </u> <input checked="" type="checkbox"/> Retraction of skin	<u> </u> <input checked="" type="checkbox"/> Bevel Insertion
<u> </u> <input checked="" type="checkbox"/> Multiple tube technique (order of draw)	<u> </u> <input checked="" type="checkbox"/> Palpation	<u> </u> <input checked="" type="checkbox"/> Tourniquet release
<u> </u> <input checked="" type="checkbox"/> Needle withdrawal	<u> </u> <input checked="" type="checkbox"/> Pressure application of the site	
- d. CARE OF SPECIMENS

<u> </u> <input checked="" type="checkbox"/> Knowledge of rocking tubes after collection to avoid clotting	<u> </u> <input checked="" type="checkbox"/> Labeling tubes
<u> </u> <input checked="" type="checkbox"/> Appropriate care of specimen if temperature dependent (i.e., specialty tests)	<u> </u> <input checked="" type="checkbox"/> Proper transport of specimens
<u> </u> <input checked="" type="checkbox"/> Short draws (effects, which tests, etc..)	<u> </u> <input checked="" type="checkbox"/> Intact vacuum
- e. HAZARDS / COMPLICATIONS / PROBLEM-SOLVING

<u> </u> <input checked="" type="checkbox"/> Improperly identified patients	<u> </u> <input checked="" type="checkbox"/> Failure to get free blood flow
<u> </u> <input checked="" type="checkbox"/> Uncooperative/Unresponsive patients	<u> </u> <input checked="" type="checkbox"/> What to do if needle breaks
<u> </u> <input checked="" type="checkbox"/> Difficult veins	<u> </u> <input checked="" type="checkbox"/> What to do if hematoma develops
<u> </u> <input checked="" type="checkbox"/> Appropriate sites to draw (i.e., i.v. placement, shunt, etc..)	<u> </u> <input checked="" type="checkbox"/> Patient Refusals
<u> </u> <input checked="" type="checkbox"/> Reporting 'signs of abuse'	
- f. POST VENIPUNCTURE PATIENT CARE

<u> </u> <input checked="" type="checkbox"/> Knowledge and skill of removing tourniquet before removing needle	<u> </u> <input checked="" type="checkbox"/> Taping site
<u> </u> <input checked="" type="checkbox"/> Careful removal of needle	<u> </u> <input checked="" type="checkbox"/> Removing all supplies from patient area
<u> </u> <input checked="" type="checkbox"/> Holding cotton or gauze on needle puncture site for sufficient time to stop bleeding	
- g. DROP-SITE PROCESSES / POLICIES AND PROCEDURES

<u> </u> <input checked="" type="checkbox"/> Centrifuge use	<u> </u> <input checked="" type="checkbox"/> Courier Tickets
<u> </u> <input checked="" type="checkbox"/> Knowledge of written policies and procedures	<u> </u> <input checked="" type="checkbox"/> Log Books

I have reviewed the above items/functions with and have observed the above-named phlebotomist while performing venipuncture.

 Venipuncture performed satisfactory Venipuncture performed unsatisfactory; additional observation/training required.

Comments: Carol is very experienced Phlebotomist, particularly good with very difficult veins.

Aileen Kitchin
Evaluator's signature Carol Ann Nichols

Carol Nichols
Phlebotomist Signature

Lab Director/Director Designee signature

Phlebotomy Manager Signature