

Competency Assessment: Clinical Laboratory Technician 1

Employee Name:	
EID:	



Initial

6 month

Annual

Acceptable performance rating for each procedure assumes the employee is competent by meeting all the requirements defined in the *Annual Evaluation and Personnel Competency Assessment* Policy. These include pre-analytical, post analytical and age/gender specific competencies.

Note: All performances with a rating of 1 or 2 require evaluator comments and performance development plan

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently- retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
				3	2	1	N/A		
TECHNICAL COMPETENCIES									
Safety:									
Complies with departmental and organizational policies and procedures concerning safety issues.									
Demonstrates ability to consistently process specimens using universal precautions by wearing Personal Protective Equipment (PPE) as required (e.g. exam gloves, lab coat and safety glasses) and utilizing all available safety devices and equipment as appropriate.									
Disposes of biohazardous waste appropriately.									
Responds appropriately to defective, malfunctioning equipment (e.g. centrifuges, refrigerators, freezers, pneumatic tube station, etc.).									
Reports information, as appropriate, when safety has been jeopardized (e.g. reporting mislabeled/misidentified specimens and other specimen-related errors via the Quality Assurance Tracker).									
Information Management:									
Complies with UW and UW Medicine Privacy and Information Security policies governing protected information.									
Maintains confidentiality of patient, employee and hospital information.									
Utilizes all available computer applications (LIS, web mail, SmarTerm, On Line Test Guide, etc.) as required and appropriately. Maintains an understanding of LIS functions (label reprint, CID comment, manually rack, etc.).									

Note: All performances with a rating of 1 or 2 require evaluator comments and performance development plan

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently- retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
				3	2	1	N/A		
TECHNICAL COMPETENCIES									
Information Management:									
Reviews and adheres to electronic work schedule. Notifies supervisor of discrepancies in a timely manner.									
Reviews Kronos timecard/payroll information for accuracy and approves timecard prior to deadline. Notifies supervisor of discrepancies in a timely manner. Submits requests for time off via Kronos according to policy.									
Demonstrates ability to answer incoming phone calls and can park and route calls appropriately. Pages providers and contacts nurses as required.									
General Specimen Processing:									
Consistently documents workstation cleaning and restocks according to specific bench requirements.									
Demonstrates ability to prioritize between Emergency Hemorrhage Panel, code patients, STATs and routine testing.									
Able to identify the significance of different colored collection tubes/Vacutainers and preservatives required for 24-hour urine collections. Identifies collection tubes containing clot activating or anticoagulant additives, as well as containers with no additives and those yielding serum or plasma upon centrifugation.									
Demonstrates ability to utilize the OLTG to locate specimen collection and storage requirements for specific tests.									
Ensures specimen integrity is maintained throughout all phases of specimen procurement (e.g. shipping, receiving, transporting, general storage, etc.). Identifies samples that may have been compromised and responds appropriately.									
Demonstrates the ability to accurately order and locate viable samples for add-on test requests.									
Verifies receipt of all specimens arriving via Lab Med courier from outside/reference client locations. Compares courier records of number of samples transported and transportation temperature to ensure samples are accounted for and specimen integrity is maintained.									
Checks in specimens as they are delivered via the front window. Ensures samples are logged in on drop-off log, labeled correctly and match corresponding requisitions.									

Note: All performances with a rating of 1 or 2 require evaluator comments and performance development plan

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently-retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
				3	2	1	N/A		
TECHNICAL COMPETENCIES									
General Specimen Processing:									
Effectively identifies and provides adequate tracking for specimens that are received, but testing is not performed by Lab Medicine by recording specimens (including but not limited to Pathology, Cytology and Cytogenetics specimens) on the Pass-Through Log.									
Documents refrigerator, freezer, incubator, and room temperatures as required.									
Pneumatic Tube:									
Operates the pneumatic tube system to safely transport appropriate items throughout the hospital.									
Responds appropriately when pneumatic tube maintenance is required, including leaks, breaks, spills or as other malfunctions occur.									
Documents/Reports the following issues: Misrouted PHI, samples sent via tube system that are not approved for this mode of transport (CSF tap), and improperly packaged blood culture bottles.									
Consistently crossmatches specimens (using 2 identifiers) arriving via pneumatic tube with corresponding orders/laboratory requisitions, applies timestamp and initials to all requisitions.									
Effectively prioritizes and routes specimens and corresponding orders arriving via the pneumatic tube station to proper locations.									
Receiving/Logging:									
Creates accurate orders in Misys (selects appropriate episodes/encounters, orders correct tests, routes specimens/containers correctly in LIS, completes 'Result Prompt Box' as required and enters all relevant information accurately).									
Demonstrates the ability to distinguish between outpatient blood draw, interfaced, partially interfaced and manual orders and able to effectively prioritize and receive/process by category.									
Identifies referred/send out testing and orders appropriate test code (unique or generic test code) and obtains approval as necessary.									

Note: All performances with a rating of 1 or 2 require evaluator comments and performance development plan

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently- retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
				3	2	1	N/A		
TECHNICAL COMPETENCIES									
Receiving/Logging:									
Processes interfaced Lab Undefined (LABUND) orders for tests that are not defined in the Lab Med Online Test Guide (OLTG).									
Combines and cancels orders as appropriate, using correct cancellation codes and ensuring credit/QA documentation is completed.									
Affixes labels to requisition and corresponding specimens properly, ensuring proper patient identification.									
As appropriate, completes shared specimen forms for problem specimens that cannot be routed to a single sample/CID.									
Marks/identifies specimen volumes that are acceptable for direct testing by automated instrumentation, such that under filled samples are not placed on instruments.									
Processes add-on test requests arriving via fax or ORCA CPOE appropriately and to viable specimens. Monitors Pending Log Monitor (PLM) to ensure inpatient add-on requests are completed in a timely manner.									
Centrifugation/Aliquotting/Specimen Distribution:									
Demonstrates ability to operate centrifuges properly, using proper balancing techniques and appropriate spin time/speed/temperature, to ensure proper and timely sample processing.									
Responds appropriately when centrifuge maintenance is required (e.g. as leaks, breaks, spills, imbalance or equipment failure).									
Allows gold and red top tubes to clot for required 30 minute period prior to centrifugation.									
Demonstrates ability to properly identify and match patient specimens with secondary/aliquot tubes and aliquots one patient at a time. Uses appropriate aliquot tube type as required.									
Safely aliquots behind splash shield, using new pipettes for each parent tube. Does not mix differing specimen types (serum, plasma, CSF, urine, etc.) in a single aliquot tube.									
Note: All performances with a rating of 1 or 2 require evaluator comments and performance development plan									

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently- retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
TECHNICAL COMPETENCIES				3	2	1	N/A		
Centrifugation/Aliquotting/Specimen Distribution:									
Delivers aliquots to appropriate bench/rack/temperature according to the code and SPOT location on the CID label. Ensures Shared Specimen form is delivered with shared specimens as required.									
Tracks and stores parent tubes in the appropriate rack location.									
Discards extra parent tube racks as appropriate after required hold period.									
Demonstrates the ability to obtain accurate total volume measurements of standard and non-standard 24-hour urine jugs, aliquots and documents total volume appropriately.									
Operation of Automated Lines:									
Ensures suitable specimens (e.g. specimens with ample specimen volume, proper CID and acceptable label placement) are loaded onto automated Chemistry and Hematology line inlets.									
Demonstrates ability to load spun versus unspun samples in the appropriate rack on the automated Chemistry line, such that spun samples bypass the centrifuge and unspun samples are routed for centrifugation.									
Retrieves specimens from automated Chemistry line outlet as appropriate.									
Creation, Transportation and Receipt of Specimen Batches:									
Creates and adds to transport batches in the LIS to track specimens sent to affiliated laboratories for testing.									
Demonstrates the ability to package at appropriate temperature and label specimen shipments according to regulatory requirements.									
Reconciles outstanding specimen log and accounts for all specimens pending transport.									
Receives incoming specimen batches and distributes samples as appropriate.									
Computer System Downtime:									
Comprehends downtime procedure such that patient orders are processed as efficiently as possible when the LIS or ordering interface is unavailable due to a scheduled or unscheduled downtime.									

3 = Can perform task independently	2 = Requires some assistance to perform task	1 = Can Not perform task independently-retraining required	N/A = Not applicable	Performance Score				Method(s) used for Competency Assessed ¹	Evaluator Initials
				3	2	1	N/A		
AGE SPECIFIC COMPETENCIES Laboratory Technical/Clinical Laboratory Staff									
Knowledge of where to find these specific age-related specimen requirements and/or methods including: a) LIS On-Line Laboratory Guide b) Laboratory Medicine divisional procedure and policy manuals.									
Understands the importance of age specific information as it relates to reference ranges. Knowledge of where to find specific gender and age-related reference ranges, including: a) Clinical Information Systems b) Laboratory On-Line User's Guides c) Divisional Procedure Manuals d) LIS programs (On-Line Laboratory Guide and Inquiry Programs)									
Demonstrates the ability and/or is prepared to provide assistance to a caller, patient or visitor to the medical center environment who is experiencing difficulty because of age (e.g. unsupervised child, confused adult). Understands this may require speaking slowly or using an age appropriate vocabulary.									
Unsupervised children (Infant through Pre-teen)									
a) Help reunite unsupervised children with their guardian, either directly or through Public Safety resource. b) Understand employee obligations during Code Amber, the Infant Abduction Code.									
Late Adulthood (65-70 years) & Geriatric (>75 years)									
a) May have problems hearing and seeing b) Face the person when talking to him/her c) Help find their medical center destination d) Keep area safe and clear so they do not fall									

¹ **Method(s) used for Competency Assessed**

O: Observed performance (direct observation performing task, specimen handling/processing).

T: Tested and passed post-Standard Operating Procedure (SOP) review quiz.

M: Monitoring records (logging errors, corrective actions, patient identification, test selection)

Employee Signature: _____

Date: _____

Evaluator Signature: _____

Date: _____

Supervisor Signature: _____

Date: _____