Replace with Name of Laboratory
Address Here

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Clear Form

COMPETENCY ASSESSMENT of PHLEBOTOMIST

Performed By Laboratory Director Designee

☐ **New Hire**

☐ **6-Month Competency**
☐ **Annual Competency**

Phlebotomist: _____ Date of Employment: _____
Print Name

Date of Evaluation: _____

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
- ____ Arm band name verification
- ____ Tourniquet application
- ____ Multiple tube technique (order of draw)
- ____ Needle withdrawal
- ____ Cleansing site
- ____ Retraction of skin
- ____ Palpation
- ____ Pressure application of the site
- ____ Equipment Usage
- ____ Bevel Insertion
- ____ Tourniquet release

____ d. CARE OF SPECIMENS
- ____ Knowledge of rocking tubes after collection to avoid clotting
- ____ Appropriate care of specimen if temperature dependent (i.e., specialty tests)
- ____ Short draws (effects, which tests, etc..)
- ____ Labeling tubes
- ____ Proper transport of specimens
- ____ Intact vacuum

____ e. HAZARDS / COMPLICATIONS / PROBLEM-SOLVING
- ____ Improperly identified patients
- ____ Uncooperative/Unresponsive patients
- ____ Difficult veins
- ____ Appropriate sites to draw (i.e., i.v. placement, shunt, etc..)
- ____ Reporting 'signs of abuse'
- ____ Failure to get free blood flow
- ____ What to do if needle breaks
- ____ What to do if hematoma develops
- ____ Patient Refusals

____ f. POST VENIPUNCTURE PATIENT CARE
- ____ Knowledge and skill of removing tourniquet before removing needle
- ____ Careful removal of needle
- ____ Holding cotton or gauze on needle puncture site for sufficient time to stop bleeding
- ____ Taping site
- ____ Removing all supplies from patient area

____ g. DROP-SITE PROCESSES / POLICIES AND PROCEDURES
- ____ Centrifuge use
- ____ Knowledge of written policies and procedures
- ____ Courier Tickets
- ____ 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.

_____ _____
Evaluator's signature Title

_____ _____
Lab Director/Director Designee signature Title