



Independent Phlebotomy Competency Assessment Form



Final Approver: Provincial Client & Support Services Program Manager

<u>Person being evaluated:</u>	<u>Date (YYYY/MM/DD):</u>
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Assessment phase		
<input type="checkbox"/> Initial Assessment	<input type="checkbox"/> Annual reassessment	<input type="checkbox"/> Other (indicate specific observation reason below)

	Observation Steps – does the evaluated person:	Yes	No	N/A	If no, corrective action taken?
1.	Obtain required equipment and supplies?				
2.	Review the collection order, patient history, and/or factors related to the collection?				
3.	Locate and greet the patient, identify themselves, and indicate the procedure to occur?				
4.	Ensure patient privacy?				
5.	Perform hand hygiene in view of the patient, and observe the “4 moments of hand hygiene” throughout the process?				
6.	Perform a Point of Care Risk Assessment, and both identify and properly don appropriate PPE, including gloves?				
7.	Ensure positive patient identification prior to collection?				
8.	Ensure appropriate pain management techniques are implemented, as appropriate?				
9.	Ensure the patient is positioned appropriately?				
10.	Successfully perform the venipuncture, following the established CLSI and NSHA/IWK Policy & Procedure?				
11.	Collect specimens following the correct order of draw, including a discard tube, if required?				
12.	Gently invert the specimens the correct number of times?				
13.	Properly remove and dispose of the needle?				
14.	Apply appropriate pressure to stop bleeding, bandage the site, and ensure patient comfort?				
15.	Label specimens in the presence of the patient?				

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16.	Ensure the label contains all information required by the Agreement (section 2.2.5)?				
17.	Complete all required documentation, including collection information, patient information (e.g. phone number) and required signatures (see section 2.5.2)?				
18.	Gather equipment, supplies, properly remove PPE, dispose of waste appropriately, and perform hand hygiene?				
19.	Package specimens as per NSHA/IWK procedures, following all Transportation of Dangerous Goods requirements?				
20.	Ensure Specimens are packaged and dispatched to the Testing Site in sufficient time such that delivery will be made no more than 90 minutes after collection (or less, if required by specific testing)?				
21.	Ensure a Delivery Confirmation Form is properly filled out and provided to the courier at the time of Specimen dispatch?				

Competency:	<input type="checkbox"/> Successful	<input type="checkbox"/> Unsuccessful
Training Issues Identified:	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<u>Evaluated person (full name and signature):</u>	<u>Date (YYYY/MM/DD):</u>
<u>Evaluator (full name and signature):</u>	<u>Date (YYYY/MM/DD):</u>