

PHLEBOTOMY COMPETENCY

(Example only)

Employee name: _____ Observations viewed in In-patients___ or Out-patients___

Date: _____ Initial competency ___ or Annual observation___

OVERALL RATING: Complete: The Phlebotomist performs the task with no difficulty (i.e., competent). Incomplete: The Phlebotomist is unable to perform the task.				
A	PATIENT APPROACH and PREPARATION	C	I	N/A
A.1	Greets the patient and identifies themselves. Explains all procedures in a manner in which patients can understand while maintaining patient confidentiality.			
A.2	Asks appropriate pre-collection questions. Can you tell me your name and date of birth? Have you had your blood taken before? Have you had any problems in the past when you have had your blood taken? Follow approved script			
A.3	Maintains patient records (requisitions, special permission forms, labels). Confirms patient orders.			
A.4	Listens effectively to patients questions and concerns and respond appropriately.			
A.5	Identifies patients appropriately as per location. (Name, HCN, unique identifier, DOB, Physician, & Requisition) .			
B	PATIENT PREPARATION AND VENIPUNCTURE			
B.1	Recognizes/identifies special instructions for patients and/or sample handling (eg warmed, chilled samples)			
B.2	Washes hands with soap and water or waterless hand sanitizer in front of the patient			
B.3	Puts on Gloves			
B.4	Positions arm correctly for vein selection.			
B.5	Applies tourniquet at appropriate place and tightness.			
B.6	Ask patient to clench fist			
B.7	Selects vein by using palpation			
B.8	Cleanses venipuncture site with alcohol pad in outward circular motion.			
B.9	Releases tourniquet and allows swabbed area to air dry while preparing equipment			
B.10	Retighten tourniquet and ask patient to clench fist again.			
B.11	Unsheathes safety needle, inspects the tip for defects or barbs. Inspects safety shield for damage.			
B.12	Anchors vein with thumb.			
B.13	Inserts needle bevel up.			
B.14	Pushes first tube onto needle without moving holder.			
B.15	Has patient relax fist when blood flows. Releases tourniquet (1 minutes maximum time).			
B.16	Fills remaining tubes in correct order of draw. Gently mixes each tube immediately after collection			
B.17	Places cotton swab/2x2 over the needle entry point (without pressure). <ul style="list-style-type: none"> • activate safety features on butterfly before removing needle from arm OR • Remove safety straight needle with a slow and even motion and activate safety feature according 			

	to manufacturers instructions.			
B.18	Apply pressure to venipuncture site.			
B.19	Discards needle and single use holder promptly in sharps container.			
B.20	Bandage patients arm after ensuring bleeding has stopped.			
B.21	Has phlebotomist explained actions during this procedure if required?			

C	Documentation and Completion	C	I	N/A
C.1	Labels tubes correctly in front of the patient (verifies name, test, etc.). Initials requisitions and labels			
C.2	Discards wastes appropriately.			
C.3	Removes gloves and washes hands before leaving room/area.			
C.4	Ensures patient safety before leaving.			
C.5	Bags specimens/requisition correctly or places in appropriate racks for transportation to the lab.			
D	SITUATIONS/RESPONSES			
D.1	Responds appropriately to patient crisis and stops collection if warranted (ex. Nausea, fainting etc.).			
D.2	Responds appropriately to stressful/challenging situations. (difficult patient, combative patient)			
D.3	Responds appropriately when unable to obtain blood or patient is unavailable (inpatients)			
E	CROSSMATCHES (Phlebotomist must have knowledge and understanding of both Inpatient and Outpatient procedures)			
E.1	Knows to take the tubes and requisitions for only one patient on tray into a room at a time. (inpatients)			
E.2	Knows to identify the patient by name, DOB, unit number/HCN/ unique identifier by checking requisition, labels, and arm band for inpatients and outpatients.			
E.3	Knows to initial labels and sign requisitions in the presence of the patient.			
E.4	Knows that inpatient area has a second person check information, outpatient area can have the patient witness. Witness must sign requisition and initial the tube labels.			

A minimum of (2) out patients collections will be viewed and 1 in patient collection (where applicable).
 All incompletes will be reviewed and corrected and a subsequent collection(s) may be required before completion of COMPETENCY.

Observer: _____ Date: _____

I HAVE HAD THIS COMPETENCY CHECKLIST DISCUSSED WITH ME.

Phlebotomist : _____ Date: _____

Comments:
