

# UCSF Medical Center

Department of Laboratory Medicine

## Monthly Assessment Checklist

Employee's Name: \_\_\_\_\_ Employee's Number: \_\_\_\_\_

Campus: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor's Name: \_\_\_\_\_

Supervisor's Signature: \_\_\_\_\_ Employee's Signature: \_\_\_\_\_

|    | Phlebotomy   | *Meet<br>Expectation | *Needs<br>Improvement | N/A | Comments |
|----|--|----------------------|-----------------------|-----|----------|
| 1  | Use 2 patient identifiers to properly identify patient (Pt. first and last name and MRN for <u>inpatients</u> ; pt. first and last name and SS#/MRN if <u>outpatient</u> ) prior to specimen collection. |                      |                       |     |          |
| 2  | Hands washed & gloves changed with every patient   |                      |                       |     |          |
| 3  | Proper protective and safety equipment used.   |                      |                       |     |          |
| 4  | Tray stocked with required equipment.  |                      |                       |     |          |
| 5  | Appropriately assesses venipuncture site.  |                      |                       |     |          |
| 6  | Proper site preparation (cleansing technique).   |                      |                       |     |          |
| 7  | Aseptic technique observed during venipuncture.  |                      |                       |     |          |
| 8  | Correct needle entry angle (between 15-30°).   |                      |                       |     |          |
| 9  | Pressure and bandage applied/secured.  |                      |                       |     |          |
| 10 | Use appropriate tubes and ensure that labeling is complete.  |                      |                       |     |          |
| 11 | Follows correct "order of draw."   |                      |                       |     |          |
| 12 | Tubes filled to correct level and properly mixed.  |                      |                       |     |          |
| 13 | Specimens properly labeled.  |                      |                       |     |          |
| 14 | Activation of needle safety device.  |                      |                       |     |          |
| 15 | Disposal of Safety Needle appropriately.   |                      |                       |     |          |
| 16 | Provides proper post-venipuncture care.  |                      |                       |     |          |
| 17 | Reviews patient fainting policies and procedures.  |                      |                       |     |          |
| 18 | Correct use of specimen labeling.  |                      |                       |     |          |
| 19 | Appropriate packaging of specimens for transport (ice, etc.) when indicated.   |                      |                       |     |          |
| 20 | Correct delivery of specimens.   |                      |                       |     |          |
| 21 | Refers to current section policies and procedures for issues related to phlebotomy.  |                      |                       |     |          |

\* No miss to one miss of the above items per month

\* Two or more misses of the above items per month

Corrective action taken: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_