Clinical Rotation
Site:_____
Preceptor Printed Name(s):

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General Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used analyzers in all departments		◯ Completed ◯ Not Applicable
	Observes or performs preventative maintenance in all departments		
	Evaluates Levey-Jennings charts for Westgard Rule violations		
	Troubleshoot QC violations in all departments		
Specimen Acceptability	Discuss the reasons and follow-up procedures for rejection of samples according to department protocol		◯ Completed ◯ Venipuncture not performed at site
	Successfully performs **a minimum of 5 venipunctures**		
Urinalysis	Successfully performs a minimum of **15 urine microscopic analyses (TRY to get at least 10 with formed elements such as casts, WBCs, RBCs, crystals, bacteria, etc.)**		◯ Completed ◯ Not Applicable
	Discuss correlation between instrument report and the microscopic results		
Analyzer operation and Reporting	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Perform instrument start-up and/or shutdown.		
	Evaluates histograms, scatterplots, clot curves, chemistry reports, etc. for accuracy		
	Discuss “critical” or “panic” values and reporting protocol		
	Discuss and observe LIS result entry.		
	Discuss and observe delta check protocol.		
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Special Procedures	Erythrocyte Sedimentation Rate		◯ Completed ◯ Not Available
	Reticulocyte Counts		◯ Completed ◯ Not Available
	Body Fluid analysis		◯ Completed ◯ Not Available
	Bone Marrow collection and smear preparation		◯ Completed ◯ Not Available
	Malarial smear		◯ Completed ◯ Not Available
	TEG or PFA		◯ Completed ◯ Not Available
	Flow Cytometry		◯ Completed ◯ Not Available
	Serology tests (Flu, HCG, Strep, etc.)		◯ Completed ◯ Not Available
	Electrophoresis		◯ Completed ◯ Not Available

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Urinalysis Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used analyzers in all departments		◯ Completed ◯ Not Applicable
	Observes centrifuge function and maintenance		
	Observes or performs preventative maintenance in all departments		
	Evaluates Levey-Jennings charts for Westgard Rule violations		
	Troubleshoot QC violations in all Urinalysis		
Specimen Acceptability	Discuss the reasons and follow-up procedures for rejection of samples according to department protocol. Discussed urine interfering substances		◯ Completed ◯ Not applicable
Urinalysis	Successfully performs a minimum of **15 urine microscopic analyses (TRY to get at least 10 with formed elements such as casts, WBCs, RBCs, crystals, bacteria, etc.)**		◯ Completed ◯ Not Applicable
	Discusses protocol for reflex to urine microscopic. Discusses and understands reflex to urine		
	Discuss correlation between instrument report and the microscopic results		
IRIS	Specimen aliquoting of urine, labeling, sample volume for IRIS, urine culture aliquoting.		◯ Completed ◯ Not Applicable
Analyzer operation and Reporting	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Perform instrument start-up and/or shutdown.		
	Evaluates histograms, scatterplots, clot curves, chemistry reports, etc. for accuracy		
	Discuss “critical” values and reporting protocol		
	Discuss and observe LIS result entry.		
	Discuss and observe delta check protocol.		
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Special Procedures	Amnisure testing		◯ Completed ◯ Not Available
	Semen Analysis		◯ Completed ◯ Not Available
	Body Fluid analysis		◯ Completed ◯ Not Available
	DNA testing		◯ Completed ◯ Not Available
	PKU collection		◯ Completed ◯ Not Available
	Flow Cytometry		◯ Completed ◯ Not Available
	Serology tests (, HCG, Strep, Mono, HIV)		◯ Completed ◯ Not Available
	Additional Tests:		

Clinical Rotation
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Chemistry Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used chemistry analyzers and immunoassays		◯ Completed ◯ Not Applicable
	Observes or performs preventative maintenance on all chemistry analyzers		
	Evaluates Levey-Jennings charts for Westgard Rule violations.		
	Troubleshoot QC violations on all chemistry analyzers		
Calibrations and linearity	Discuss/observe calibration procedure and protocol of different analytes.		◯ Completed ◯ Not Applicable
	Discuss/observe frequency and procedure for linearity studies of chemistry equipment		
Specimen Acceptability	Discuss the reasons and follow-up procedures for rejection of samples according to department protocol.		◯ Completed ◯ Not Applicable
	Determines appropriate sample type (serum/plasma, additive, etc.)		
	Identifies preanalytical errors and/or physiological conditions which will interfere with specific tests, ie, hemolysis, lipemia, icterus, incorrect tube additive, etc.		
Analyzer operation of Patient Samples and Reporting	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Perform instrument start-up and/or shutdown.		
	Appropriately acts on results beyond the linearity and/or reportable range of the instrument/network		
	Discuss “critical” or “panic” values and reporting protocol		
	Discuss and observe LIS result entry.		
	Discuss and observe delta check protocol.		
	Discuss and perform dilutions when necessary.		
Referral (send out) Testing	Discuss/observe specimen processing, paperwork, and tests involved in referral testing		◯ Completed ◯ Not Applicable
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Special Procedures	Osmometry		◯ Completed ◯ Not Available
	Serology (Flu, Strep, HCG, Mono, etc.)		◯ Completed ◯ Not Available
	Electrophoresis		◯ Completed ◯ Not Available
	Sweat Chloride		◯ Completed ◯ Not Available
	Esoteric chemistry testing:		

Clinical Rotation
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Point of Care Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used on Point of care devises. Knowledgeable of daily and monthly QC		◯ Completed ◯ Not Applicable
	Observes or performs preventative maintenance and /or cleaning analyzers		
	Glucose, ISTAT, Medtronix, HCG, Rapid strep Reagent storage		
	Troubleshoot QC violations on all chemistry analyzers		
Calibrations and linearity	Discuss/observe calibration procedure and protocol of different analytes.		◯ Completed ◯ Not Applicable
	Discuss/observe frequency and procedure for linearity and or correlation studies of equipment		
Specimen Acceptability	Discuss the reasons and follow-up procedures for rejection of samples according to department protocol.		◯ Completed ◯ Not Applicable
	Determines appropriate sample type (serum/plasma, additive, etc.)		
	Identifies preanalytical errors and/or physiological conditions which will interfere with specific tests, ie, hemolysis, lipemia, icterus, incorrect tube additive, etc.		
Analyzer operation of Patient Samples and Reporting	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Perform instrument start-up and/or shutdown.		
	Appropriately acts on results beyond the linearity and/or reportable range of the instrument/network		
	Discuss “critical” values and reporting protocol		
	Discuss and observe LIS result entry.		
	Discuss and observe delta check protocol.		
	Discuss and observe downloading results and auto release		
Trauma protocol with iSTAT testing	Discuss/observe specimen processing, paperwork, and tests involved in the trauma protocol		◯ Completed ◯ Not Applicable
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Special Procedures	Glucose – NOVA meter		◯ Completed ◯ Not Available
	Serology (Strep, HCG,)		◯ Completed ◯ Not Available
	Medtronic		◯ Completed ◯ Not Available
	iSTAT – CG*, Chem 8, Medtronic		◯ Completed ◯ Not Available
	iSTAT – BNP – Troponin – orders, results, critical results, critical result documentation , Pending list,		

Clinical Rotation Site:_____
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Idaho State University

Microbiology Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used microbiology reagents, media, and applicable instrumentation		◯ Completed ◯ Not Applicable
	Observes or performs preventative maintenance on microbe identification and blood culture instruments		
Specimen Processing (except 2 week rotations)	State the sample types that are acceptable/rejection criteria for each type of culture or rapid test.		◯ Completed ◯ Not Applicable
	Correctly identifies source identification and proper labeling		
	Appropriately streaks, inoculates, incubates, and/or packages the specimens according to procedure		
Blood Cultures	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Load and unload blood culture bottles		
	Discuss and/or perform the procedure for processing and "calling" positive blood cultures		
Microbial ID and Sensitivity	Discuss the methodology of the microbial identification and sensitivity system.		◯ Completed ◯ Not Applicable
	Successfully inoculate and read ID and sensitivity panels.		
	Recognize and troubleshoot results that are unexpected or unacceptable.		
Gram Stains (except 2 week rotations)	Successfully completes a **minimum of 5 respiratory, 5 blood culture, and 5 wound/misc gram stains)**		◯ Completed ◯ Not Applicable
Plate Reading (only during 2 or 3 week rotations)	Discuss, observe, and participate in identifying pathogenic organisms in the following types of cultures: blood cultures, respiratory, gastrointestinal, urogenital, and miscellaneous sites such as wounds, CSF and other body fluids.)		◯ Completed ◯ Not Applicable
	Identify normal flora and differentiate normal flora from pathogens in each of culture types listed above.		
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Special Procedures	Catalase, Coagulase, Staph or Strep Typing		◯ Completed ◯ Not Available
	Oxidase, Indole, PYR		◯ Completed ◯ Not Available
	Catarrhalis, Microdase, Cefinase disks		◯ Completed ◯ Not Available
	Wet mounts		◯ Completed ◯ Not Available
	MRSA screens		◯ Completed ◯ Not Available
	Kirby Bauer, Etest, etc.		◯ Completed ◯ Not Available
	Molecular Diagnostics (Cepheid, OptiGene, etc.)		◯ Completed ◯ Not Available
	Serology tests (Flu, Strep, RSV, etc.)		◯ Completed ◯ Not Available

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Hematology Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control and Maintenance	Performs QC on routinely used hematology and coagulation analyzers and coag centrifuge		◯ Completed ◯ Not Applicable
	Observes or performs preventative maintenance on hematology and coagulation analyzers		
	Evaluates Levey-Jennings charts for Westgard Rule violations		
	Troubleshoot QC violations in both hematology and coagulation		
Blood Smears	Successfully prepares a minimum of **10 blood smears** with feathered edges and evenly distributed cells		◯ Completed ◯ Not Applicable
Specimen Acceptability	Discuss the reasons and follow-up procedures for rejection of samples according to department protocol.		◯ Completed ◯ Not Applicable
Analyzer operation and Reporting	Read/discuss principle of the instrument operation or test procedure reaction.		◯ Completed ◯ Not Applicable
	Perform instrument start-up and/or shutdown.		
	Evaluates histograms, scatterplots, clot curves for accuracy		
	Discuss “critical” or “panic” values and reporting protocol		
	Discuss and observe LIS result entry.		
	Discuss and observe delta check protocol.		
Theory	Discuss the clinical significance of abnormal results obtained, correlating patient results as to possible disease and/or therapy states.		◯ Completed ◯ Not Applicable
Manual Differentials/ Cell Counts	Successfully perform a minimum of **15 “normal” manual differentials (blood or body fluid)**		◯ Completed ◯ Not Applicable
	Successfully perform a minimum of **15 “abnormal” manual differentials (blood or body fluid)**		
	Successfully performs a minimum of **3 body fluid cell counts** according to laboratory procedure		
	Reviews criteria for pathology review of blood and body fluid smears		
Special Procedures	Bone Marrow collection and smear preparation		◯ Completed ◯ Not Available
	Reticulocyte Counts		◯ Completed ◯ Not Available
	Erythrocyte sedimentation rate		◯ Completed ◯ Not Available
	Malarial smear		◯ Completed ◯ Not Available
	Sickle cell solubility		◯ Completed ◯ Not Available
	Platelet function assay		◯ Completed ◯ Not Available
	TEG		◯ Completed ◯ Not Available
	Urinalysis (QC, dipstick, UA microscopics)		◯ Completed ◯ Not Available

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Immunohematology Clinical Rotation
Competency Checklist

Student Name: _____

Area	Specific requirements	Notes	Check off
Quality Control	Performs QC on routinely used blood bank reagents Reviews QC and preventative maintenance procedures for cell washers, heat blocks, refrigerators and freezers		◯ Completed ◯ Not Applicable
Components	Discuss appropriate utilization of cryoprecipitate, fresh frozen plasma, CMV negative RBCs, platelets, and other products. Discuss and/or observe component processing such as irradiation, pooling, aliquoting and concentrating States expiration time and storage temperature for each component.		◯ Completed ◯ Not Applicable
Specimen Acceptability and collection	States the reason for rejection of samples by the transfusion service. Successfully perform a minimum of **5 venipuncture procedures**		◯ Completed ◯ Venipuncture NOT performed at site
Blood Distribution	Discuss reasons for rejection of components due to appearance. Discuss labeling required on component bags Discuss and/or observe the documentation process in the LIS		◯ Completed ◯ Not Applicable
Routine Testing	Successfully performs a minimum of **10 ABO/D and Antibody Screens (T&S)** Successfully performs a minimum of **5 crossmatches** (can be included with the T&S samples above) Successfully performs a minimum of **5 antibody identifications** (wet or dry) Lists and states the antibody class, phase of reactivity, clinical significance and transfusion requirements: Rh, Jk, K, Fy, Lutheran, M, N, S, Le, P1, and I.		◯ Completed ◯ Not Applicable
DAT	Successfully performs a minimum of **2 Direct Antiglobulin Tests (DAT)** Discuss and/or perform an elution.		◯ Completed ◯ Not Applicable
Rh Immune Globulin work up	Discuss when the Rh Immune Globulin work up is performed Discuss and/or observe the fetal bleed screen Discuss and/or observe the Kleihauer-Betke stain. Discuss and/or observe the process for determining the number of vials to give		◯ Completed ◯ Not Applicable
Special Testing	Discuss and/or observe appropriate use of enzyme-treated cells, neutralizations, elutions, auto-absorptions, etc.	List the special tests they observed/performed:	◯ Completed ◯ Not Applicable