

Annex 12-A: Orientation Checklist Example

EMPLOYEE INFORMATION			
Name:	Start date:		
Position:	Manager:		
FIRST DAY			
<input type="checkbox"/> Provide employee with New Employee Handbook.			
<input type="checkbox"/> Assign "buddy" employee(s) to answer general questions.			
POLICIES			
<input type="checkbox"/> Review key policies.	<ul style="list-style-type: none"> • Anti-harassment • Vacation and sick leave • Leave of absence • Holidays • Time and leave reporting • Overtime • Performance reviews • Dress code 	<ul style="list-style-type: none"> • Personal conduct standards • Progressive disciplinary actions • Security • Confidentiality • Safety • Emergency procedures • Visitors • E-mail and Internet use 	
ADMINISTRATIVE PROCEDURES			
<input type="checkbox"/> Review general administrative procedures.	<ul style="list-style-type: none"> • Office/desk/work station • Keys • Mail (incoming and outgoing) • Shipping • Business cards • Purchase requests 	<ul style="list-style-type: none"> • Telephones • Building access cards • Conference rooms • Picture ID badges • Expense reports • Office supplies 	
INTRODUCTIONS AND TOURS			
<input type="checkbox"/> Give introductions to department staff and key personnel during tour.			
<input type="checkbox"/> Tour of facility, including:	<ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy centers • Fax machines 	<ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies 	<ul style="list-style-type: none"> • Kitchen • Coffee/vending machines • Cafeteria • Emergency exits and supplies
POSITION INFORMATION			
<input type="checkbox"/> Introductions to team.			
<input type="checkbox"/> Review initial job assignments and training plans.			
<input type="checkbox"/> Review job description and performance expectations and standards.			
<input type="checkbox"/> Review job schedule and hours.			
<input type="checkbox"/> Review payroll timing, time cards (if applicable), and policies and procedures.			
COMPUTERS			
<input type="checkbox"/> Hardware and software reviews, including:	<ul style="list-style-type: none"> • E-mail • Intranet 	<ul style="list-style-type: none"> • Code access • Data on shared drives 	<ul style="list-style-type: none"> • Databases • Internet

Annex 12-B: Competency Assessment Checklist Example

COMPETENCY ASSESSMENT

ANALYST NAME _____ TITLE _____

PERIOD _____ TO _____ DATE DUE _____

METHOD/PROCEDURE _____

READING OF PERTINENT
PORTIONS OF THE
PROCEDURE MANUALS

YES	NO	N/A	COMMENTS

DIRECT OBSERVATION

Safety policies followed				
Preparation of work area				
Work area neat and organized				
Policies, procedures and rules pertaining to assignment followed				
Preparation/handling of specimen				
Preparation/handling of reagents				
Preparation/handling of QC				
Preparation/handling of equipment and maintenance activities				

Knowledge of criteria for acceptance of specimen				
Knowledge of criteria for rejection of specimen				

Annex 12-C: Competency Assessment Log-book Example

Competency Assessment Log					
Main Hospital – Laboratory					
Employee	Date	Task	Assessor	Appraisal	Comment
Smith, John	14/02/00	Gram stain	Ng, Mary	Acceptable	Re-assess in 1 yr
Smith, John	18/02/00	Kirby-Bauer	Smith, Alice	Reassess	Placement of disks too crowded; Re-assess in 14 days
Smith, John	02/03/00	Kirby-Bauer(2)	Smith, Alice	Acceptable	Re-assess in 1 yr
Smith, John	14/08/00	Load BC bottles	Ng, Mary	Acceptable	
Smith, John	27/10/00	Cytocentrifuge	Mbeya, Alan	Acceptable	Re-assess in 1 yr
Smith, John	02/04/01	Fill autoclave	Mbeya, Alan	Acceptable	
Smith, John	05/08/01	Data entry	Ng, Mary	Re-assess	3 entry errors. Read manual and re-assess in 10 days