

	1	Proficiency Testing (PT) Checklist	
		Survey Name/kit # _____ Due Date _____	
		Performing Proficiency (PT) test:	Completed
	1	Each laboratory must rotate proficiency test samples among all staff who normally handle patient specimens, and perform the particular test.	
	2	Read the instructions received with the Kit, as they may change from one challenge to another. <u>Make note of the submission deadline</u>	
	3	Verify kit content. If incomplete, or contain broken specimen contact your PT provider within 5 - 8 calendar days of the ship date.	
	4	Verify labels on each specimen. Use standard precautions when handling each specimen.	
	5	Reconstitute specimens only when ready to analyze. Adhere to timing requirements in the kit (e.g. allow to stand for 10 minutes prior to testing).	
	6	Carefully reconstitute specimens when indicated.	
	7	Carefully mix all specimens before analysis. Follow specific directions, as stated in PT instruction.	
	8	Include PT specimens with patient runs if possible. If not, test each PT sample exactly as you would a patient.	
	9	Keep all testing records for PT samples (e.g., worksheets, printouts etc.)	
	10	If appropriate, freeze and save PT samples for troubleshooting purposes (any retesting of PT sample must be done only after reports has been submitted to PT provider).	
	11	If patient samples are routinely sent to a closely affiliated laboratory for consultation, additional or confirmatory testing, proficiency testing samples MUST NOT follow this practice.	
	12	DO NOT engage in inter-laboratory communication pertaining to proficiency testing results, until submission deadline has passed.	
		Submitting survey results:	Completed
	1	All PT results <u>must be submitted on-line</u> . When electronic submission is available	
	2	Carefully transcribe result to PT online forms for reporting.	
	3	Check analytes unit measure. (Changes in units may require additional calculation).	
	4	Review code summaries included in your kit's documentation to ensure method code, instrument code and units codes are correct.	
	5	Read all options offered, and indicate the most appropriate for your test (e.g., "test not performed".)	
	6	Check calculation if dilution is performed.	
	7	Check for clerical errors e.g., decimal points placements etc.	
	8	Attestation form MUST BE SIGNED by the staff performing the PT test, and the Laboratory Director. Document any appropriate comments in the area provided.(Retain the form with laboratory records)	
	10	Submit completed survey documentation <u>PRIOR TO DUE DATE</u>	
	11	Implement a review process for accuracy prior to final submission and <u>DO NOT forget to hit the SUBMIT button</u>	
	12	Forward completed <u>Survey Submission Documentation Form</u> to the CQI office immediately upon completion of step # 10	

	2	Proficiency Testing (PT) Checklist	
		Survey Name/kit # _____ Due Date _____	
		PT Report Review	Completed
1		Each PT evaluation report must be reviewed and signed by the Director or Technical Supervisor .	
2		Investigate discrepant results and/or unacceptable results, including all ungraded or educational challenges	
3		Document all corrective action (s).	
4		Review and assess peer group comparison for trending.	
5		PT events with less than 10 lab participants automatically receive a score of 100%. The laboratory must not accept this score as having met satisfactory performance. An evaluation of the report must be performed to demonstrate that the laboratory has met established Proficiency Testing criteria. The evaluation must be performed as done for interlaboratory comparisons-(as it is would be done for an alternative proficiency program report).	
6		The PT evaluation report must have documentation of active review. (document acceptable ranges on the evaluation report, as well as assessment of your laboratory's performance).	
7		Conclude the report review by documenting notes, date, and Director or designee signature.	
8		Retain all PT records for at least 2 years	
		PT Failure Investigation	Completed
		Assess the root cause of PT failure by:	
1		Checking for clerical errors	
2		Reviewing QC performance, instrument calibration/maintenance, and reagent performance prior to testing, during testing, and after original analysis of the PT challenge	
3		Verifying that the PT material was processed in the correct manner (i.e. instrument mode etc.)	
4		Verifying that sample reconstitution was performed according to survey instructions.	
5		Reviewing results from previous PT surveys.	
6		Retesting PT specimen, if possible.(laboratory can request additional aliquots of material from PT provider)	
		Documentation of investigation	
7		Report / document causes of PT failure	
8		Assess all patient results which were run at the time of the failed PT for adverse impact to patient care	
9		Conclude investigation by documenting any remedial action implemented to prevent re-occurrence.	