

Technical Competency Self-Evaluation – Unit Clerk

Employee Name: _____ Unit: _____

Title: _____ Supervisor: _____

Directions: Mark each box for the best corresponding answer. Example: If the statement is **I document when I have contacted a physician** place a mark in the box which best describes how you perform this behavior: **Always, Some of the time, or Rarely**. Scores will be totaled at the end of the self-evaluation.

Technical Competency Standard	Always	Some of the time	Rarely
1. I function on the unit as a PCT when necessary			
2. I answer the telephone using the standard phone greeting, communicate in a professional manner with callers, and transfer calls as needed.			
3. I assist patients with their personal care, including bathing, oral care, skin care, hair care, dressing, etc. if needed.			
4. I monitor the schedule board for patients who have not been bathed every other day.			
5. I update the patient board and staff board at the beginning of each shift.			
6. I greet visitors as soon as they arrive on the unit and direct them as needed.			
7. I scan orders to the pharmacy within a timely manner.			
8. I fax a completed census to CNO by noon daily.			
9. I enter orders from the charts, flag these orders for nurse review, and flag the chart holders.			
10. I order supplies using the SMART and MediBuy systems.			
11. I page physicians when requested through their exchanges.			
12. I alert physicians when a new admission arrives to the unit.			
13. I assist the nurse with nursing procedures when required.			
14. I add newly admitted patients to the schedule board.			
15. I treat all my patients with Universal Precautions.			
16. I give status reports with correct & current information to the SNU before leaving the unit.			
17. I answer the call system promptly/correctly and turn it off when completed in order to maintain patient confidentiality.			
18. I orient patients/families to the unit and hospital routine.			
19. I ensure that my unit is adequately stocked with supplies.			
20. I prepare chart for new admissions.			
21. I badge in & out for each of my shifts in the correct cost center.			
22. I identify malfunctioning equipment and initiate repair.			
23. I enter daily labs into the computer.			
24. I float to other units as assigned by my supervisor.			
25. I take at least 8 hours of PTAN annually.			
26. I observe HIPPA Privacy Standards and monitor the unit routinely for HIPPA violations.			
27. I arrive to the unit on-time for my shifts.			
28. I dress professionally by wearing appropriate attire such as clean scrubs, closed-toe shoes, T-shirts with			

appropriate logos, etc.			
29. I am aware of my language and what conversations patients could be overhearing while on the unit or at the nurses' station.			
30. I discharge patients in bed tracking as soon as they are discharged from the unit.			
31. I precept PCTS who are training to be Unit Clerks.			
32. I renew my CPR certification before the expiration date.			
33. I assist at mealtimes when possible.			
34. I coordinate unit activities with other departments across campus.			
35. I relay messages as needed to the nurses, PCTs, physicians, etc.			
36. I recognize that I am seen as a central figure of the unit and recognize that it is important to remain calm, professional, and respectful.			
37. I manage the nurses station so that it appears as uncluttered and pleasant as possible to our staff and guests.			
38. I communicate constantly with the unit SNU and update he/she as needed.			
39. I ensure that orders I have entered as accurate as possible.			
40. I check my Time Trax and submit appropriate Kronos correction forms before payroll Mondays.			
41. I assist patients if there is no one else available.			
42. I enter work-orders in the computer when necessary.			
43. I set up the pager system at the beginning of the shift.			
44. I gown, glove, and – if necessary – wear a mask when I cross a doorway into an isolation room.			
45. I wash/foam my hands before and after touching a patient.			
46. I ensure that the nurses' station is organized and clean before end of shift.			
47. I am responsible for ensuring that my pay is correct by monitoring my badge ins/outs and ensuring that correct Kronos forms are submitted to the timekeeper.			
48. I copy charts for patient transfers.			
49. I attend scheduled inservices/meetings.			
50. I correctly scan items I use from the POU rooms.			
51. I ensure that the nurse and PCT are aware of new admissions when they arrive to the unit.			
52. I take care with equipment, furniture, and my general surroundings on the unit and am aware of how neglect of my surroundings impacts the Rehab Center.			
53. I have less than 5 unscheduled absences in a 12 month period			

Step 1: Write down number of marks in the "Always" category in this blank _____

Step 2: Multiply the score from Step 1 x 2. Write the total in this blank _____

Step 3: Write down number of marks in the "Some Of The Time" category _____

Step 4: Add totals from Step 2 & Step 3 only and write the total in this blank _____

Employee Signature

Date

Technical Competency Scoring Results

If you scored 88 – 104:

You are providing excellent unit clerk and you are an important asset to St. David's. You share St. David's value system, you are proactive, and recognize the importance effective and efficient unit clerking. You have the ability to get the job done the way it should be done. You have a positive attitude and you are an excellent role model and mentor to new employees. You view St. David's as *your* hospital. Your supervisor will discuss this evaluation with you during your evaluation meeting, so please bring it with you.

If you scored 52 – 87:

You are a good, solid employee and are a most important unit clerk to St. David's as you can cause us to succeed or fail in providing excellent nursing care. You actively follow correct procedure and guide the unit through your shift. You are wanted as an employee and St. David's is committed to your success and developing you into a unit clerk who helps manage an excellent, safe nursing unit. Your supervisor will discuss this evaluation with you during your evaluation meeting, so please bring it with you.

If you scored 0 –51:

You do not provide consistent and adequate unit clerking. Your supervisor will discuss this evaluation with you during your evaluation meeting, so please bring it with you.

Supervisor/Employee Meeting Notes

Re-score (if necessary)

Step 1: Write down number of marks in the "Always" category in this blank _____

Step 2: Multiply the score from Step 1 x 2. Write the total in this blank _____

Step 3: Write down number of marks in the "Some Of The Time" category _____

Step 4: Add totals from Step 2 & Step 3 only and write the total in this blank _____

Goals/Comments: _____
