Technical Consultant (Moderate Complexity) Qualification and Assessment Form

(Refer to CQS-SOP-0027 for instructions on how to use this form)

Laboratory Name	Department

CLIA #	CAP #

Technical Consultant Name	Phone #

Certification - Boards (Identify)	State License (if applicable)

Signature of Technical Consultant	Date

Signature of Medical Director	Date

Check the appropriate education level and qualification (numbers 1-5):

- [ ] 1. M.D., D.O. licensed to practice in the State of New Mexico and certified in anatomic and/or clinical pathology by ABP or AOBP or equivalent qualifications.

- [ ] 2. M.D., D.O. or D.P.M. licensed to practice in New Mexico and 1 year laboratory training/experience in nonwaived testing in the designated specialty of responsibility.

- [ ] 3. Doctorate in chemical, physical, biological or clinical laboratory science or medical technology and 1 year laboratory training/experience in nonwaived testing in the designated specialty/subspecialty of responsibility.

- [ ] 4. Master's in chemical, physical, biological or clinical laboratory science or medical technology and 1 year laboratory training/experience in nonwaived testing in the designated specialty/subspecialty of responsibility

- [ ] 5. Bachelor's in chemical, physical, biological or clinical laboratory science or medical technology and 2 years laboratory training/experience in nonwaived testing in the designated specialty/ subspecialty of responsibility

Assessment - Technical Consultant, Moderate Complexity Testing

Assigned Responsibility	Assessment Method	Satisfactory	Reviewer	Date	Comments
Accessible to the laboratory to provide on-site, telephone or electronic consultation.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Test Method selection and verification	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Proficiency Testing: Responsible for proficiency testing program and processes, including: enrollment, testing procedures, reporting, review and corrective action.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Quality Control: Establishes and monitors a QC/QA program to monitor ongoing test performance.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Laboratory Personnel Training and Performance Assessment: Identifies training needs and assures that each individual performing tests receives initial training and regular in-service training appropriate for the type and complexity of the laboratory services performed	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Competency Assessment: Assess the competency of personnel performing moderate complexity testing.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Resolution of technical problems and ensuring that remedial actions are taken and documented	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Ensuring that patient results are not reported until corrective actions are taken and test systems are functioning properly.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Biennial review of policies, procedures, job aids and forms when there are no changes or minor changes.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			
Procedure Manual- ensure that procedures are complete, up to date, available and followed.	Direct Observation Review of Records Problem Solving Skills	YES NO N/A			