COLLEGE of AMERICAN PATHOLOGISTS

INSTRUCTIONS FOR COMPLETING THE PERSONNEL EVALUATION ROSTER

1. All laboratories performing non-waived testing must complete the Personnel Evaluation Roster (PER) -**CLIA Roles***, **Laboratory Testing Personnel**, and **Non-laboratory Testing Personnel.**

   *Only laboratories subject to US Regulations will enter CLIA roles. All other labs will only enter Laboratory Testing Personnel and Non-laboratory Testing Personnel

2. Complete the **CLIA Roles** section – CLIA roles must be fulfilled by qualified personnel and match the test complexity performed in the laboratory. Click the help symbol, "?", next to a CLIA role for the qualifications of a particular role.

   - Laboratory Director- All laboratories must have a laboratory director. The laboratory director's name will automatically display. All other CLIA roles may be fulfilled by the laboratory director or other qualified personnel.
   - Clinical Consultant- If there is moderate and/or high complexity testing performed in the laboratory, at least one person must be assigned to this role.
   - Section/Department CLIA roles- If non-waived testing is performed in the section unit, one or more of the following roles are required. An individual can have multiple CLIA roles within and across sections/departments.

     - General Supervisor – If there is high complexity testing performed in this section/department, must assign at least one person to this role.
     - Technical Consultant – If there is moderate complexity testing performed in this section/department, must assign at least one person to this role.
     - Technical Supervisor – If there is high complexity testing performed in this section/department, must assign at least one person to this role.

   - Only people listed on the Staff List may be added to the PER. The **Staff List** is a master list of employees and must include ALL non-waived testing personnel, supervisory and consultant personnel, medical director and staff pathologists. Listing waived testing personnel, administrative or non-testing staff is optional on this list.

3. Complete the **Laboratory Testing Personnel** section. Individuals may be added one person at a time or bulk-uploaded using the provided template. To bulk-load:

   - Click on "Download Spreadsheet template" and save a working copy of the new PER template. **Do not edit the column headers or add /.remove column.** Red asterisks indicate required data.
   - Copy and paste personnel data from your last completed Personnel Evaluation Roster spreadsheet to the new PER template. Alternatively, export the Staff List, open in Excel and copy/paste the relevant data into the PER template.
   - Review the template and add or remove people as needed. All laboratory personnel performing non-waived testing in your laboratory must be listed.

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- Save the completed spreadsheet and click on "Upload Completed Spreadsheet". Once you get the upload confirmation message, the import process will start. The larger the spreadsheet the longer the import process, but you can leave that page to do other work or even close the browser and the import process will continue until completion.
- The uploaded data will create an online grid populated with the data provided and a task to review it. Subsequent entries can be made by using the *Add Laboratory Testing Personnel* box.
- All required fields are marked with red asterisks. (License numbers/expiration dates are optional fields with the exception of the state of Florida).
- To remove an employee from the Personnel List, click the remove button.
- Have the laboratory director click on the sign button to add a signature.

4. Complete the **Non-laboratory Testing Personnel** section.

- You will be asked if there are non-laboratory personnel (nursing staff for point-of-care) performing non-waived testing. Click on *Add Response* and answer the question.
- If you answer yes, you have two options. Either download the template, enter the data, and upload it **or** attach your own document that contains all the required data.
- After a document is attached, updates are made by opening the document, making edits, saving the document and replacing the attachment with the newly edited document.
- Have the laboratory director click on the Sign button to add a signature.

5. The PER should be current at all times – add or delete personnel online as the changes occur.