

UNIQUE STANDARDS FOR SPECIFIC APPROVED PROGRAMS

Phlebotomist Standards

PREAMBLE

OBJECTIVE

The purpose of these Standards and the Description of the Profession is to establish, maintain, and promote standards of quality for educational programs in the clinical laboratory sciences and to provide recognition for educational programs which meet or exceed the minimum standards outlined in this document.

The Standards are to be used for the development and evaluation of phlebotomy programs. Paper reviewers assist in the evaluation of the program's compliance with the Standards. Lists of approved programs are published for the information of students, employers, and the public.

DESCRIPTION OF THE PROFESSION

Phlebotomists are proficient in:

- a. collecting, transporting, handling and processing blood specimens for analysis;
- b. recognizing the importance of specimen collection in the overall patient care system;
- c. relating the anatomy and physiology of body systems and anatomic terminology to the major areas of the clinical laboratory, and to general pathologic conditions associated with body systems;
- d. identifying and selecting equipment, supplies and additives used in blood collection;
- e. recognizing factors that affect specimen collection procedures and test results, and taking appropriate actions within predetermined limits, when applicable;
- f. recognizing and adhering to infection control and safety policies and procedures;
- g. monitoring quality control within predetermined limits;
- h. recognizing the various components of the health care delivery system;
- i. recognizing the responsibilities of other laboratory and health care personnel and interacting with them with respect for their jobs and patient care;
- j. demonstrating professional conduct, stress management, interpersonal and communication skills with patients, peers and other health care personnel and with the public;
- k. demonstrating an understanding of requisitioning and the legal implications of their work environment;
- l. applying basic principles in learning new techniques and procedures;
- m. recognizing and acting upon individual needs for continuing education as a function of growth and maintenance of professional competence.

Upon graduation and initial employment, the phlebotomist will be able to demonstrate entry level competencies in the above areas of professional practice. Refer to the NAACLS Phlebotomist Competencies.

20. Program Director

A. The program must designate a qualified program director.

B. Responsibilities

The program director must be responsible for the organization, administration, periodic review, planning, development, evaluation and general effectiveness of the program. The program director must be responsible for maintaining NAACLS approval of the program.

C. Qualifications

The program director must hold a baccalaureate degree or higher and hold current certification by a nationally recognized agency for clinical laboratory science, or have formal training and current certification in phlebotomy. The program director must document continuing education hours (2.0 CEUs or 20 hours) in phlebotomy, clinical laboratory science, and/or education (including computer applications) within the previous two years. The program director must have knowledge of education and administration as well as current approval/certification procedures.

21. Faculty

The program must have qualified didactic and clinical faculty. (Didactic faculty are defined as instructors teaching the didactic components of phlebotomy. Clinical faculty are defined as instructors teaching the applied components of phlebotomy).

A. Didactic Faculty

1. Responsibilities

The faculty must participate in teaching courses, supervising applied laboratory learning experiences, evaluating student achievement, developing curriculum, formulating policy and procedures, and evaluating program effectiveness.

2. Qualifications

Didactic faculty must hold an associate degree or higher, or 60 college credit hours from an accredited institution, or an equivalent combination of education and experience with a minimum of 30 college credit hours and 3 years of relevant teaching experience. They must also have current certification in phlebotomy or clinical laboratory science and document continuing education hours (2.0 CEUs or 20 hours) in phlebotomy, clinical laboratory science, and/or education (including computer applications) within the previous two years.

3. Professional Development

The program must assure and document ongoing professional development of the program faculty to assure that the didactic faculty members are able to fulfill their instructional responsibilities.

B. Clinical Faculty

1. Responsibilities

The clinical faculty must participate in instructing students during clinical experiences and evaluating student achievement.

2. Qualifications

Clinical instructors must hold current certification in phlebotomy or clinical laboratory science, or have one year of full time phlebotomy experience.

C. Consortium Education Coordinator (when required, one at each participating entity in a consortium or joint venture)

1. Responsibilities

The Consortium Education Coordinator, when required, is responsible for coordinating classroom teaching and applied education, evaluating program effectiveness, and must have appropriate communications with the Program Director.

2. Qualifications

The education coordinator, when required, must hold an appropriate nationally recognized certification required of a program director as stated in Standard 20, an academic degree appropriate to the program level, and at least one year of experience in clinical laboratory science education, including teaching courses, conducting and managing learning experiences, evaluation student achievement, and evaluating instructional effectiveness.

22. Curricular Requirements

A. Curricular Structure

Instruction must follow a plan which documents a structured curriculum, including applied education, with clearly written program goals and competencies and course syllabi which include individual course goals and objectives. Behavioral objectives which address cognitive, psychomotor, and affective domains must be provided for didactic and applied aspects of the program. Course objectives must show progression to the level consistent with entry into the profession and be cross-referenced to the NAACLS Phlebotomist Competencies in the NAACLS 9A matrix. These competencies must be used to design didactic and applied curriculum.

B. Instructional Areas

The curriculum must include instruction/experiences in the following:

1. 100 hours of applied experiences;
2. Performance of a minimum of 100 successful unaided collections;
3. Instruction in a variety of collection techniques, including vacuum collection devices, syringe and capillary/skin-puncture methods, and
4. Contact with various patient types, which may include varied clinical settings, such as health fairs, donor or pheresis centers, nursing home collection, in addition to the generally accepted inpatient and outpatient settings.

C. Learning Experiences

The learning experiences needed in the curriculum to develop and support entry level competencies must be properly sequenced and include instructional materials, classroom presentations, discussion, demonstrations, laboratory sessions, supervised practice and experience.

1. Student experiences must be educational and balanced so that all competencies can be achieved.
2. Student experiences at different clinical sites must be comparable to enable students to achieve entry level competencies.
3. Policies and processes by which students may perform service work must be published and made known to all concerned in order to avoid practices in which students are substituted for regular staff. After demonstrating proficiency, students, with qualified supervision, may be permitted to perform procedures. Service work by students in clinical settings outside of regular academic hours must be noncompulsory.

D. Evaluations

Written criteria for passing, failing, and progression in the program must be provided. These must be given to each student at the time of entry into the program. Evaluation systems must be correlated to the objectives and competencies described in the curriculum for both didactic and applied components, and in all three domains. They must be employed frequently enough to provide students and faculty with timely indications of the students' academic standing and progress, and to serve as a reliable indicator of the effectiveness of instruction and course design.

NAACLS Entry-Level Phlebotomist Competencies

- 1.00 Demonstrate knowledge of the health care delivery system and medical terminology.
 - 1.1 Identify the health care providers in hospitals and clinics and the phlebotomist's role as a member of this health care team.
 - 1.2 Describe the various hospital departments and their major functions in which the phlebotomist may interact in his/her role.
 - 1.3 Describe the organizational structure of the clinical laboratory department.
 - 1.4 Discuss the roles of the clinical laboratory personnel and their qualifications for these professional positions.
 - 1.5 List the types of laboratory procedures performed in the various disciplines of the clinical laboratory department.
 - 1.6 Describe how laboratory testing is used to assess body functions and disease.
 - 1.7 Use common medical terminology.
- 2.00 Demonstrate knowledge of infection control and safety.
 - 2.1 Identify policies and procedures for maintaining laboratory safety.
 - 2.2 Demonstrate accepted practices for infection control, isolation techniques, aseptic techniques and methods for disease prevention.
 - 2.2.1 Identify and discuss the modes of transmission of infection and methods for prevention.
 - 2.2.2 Identify and properly label biohazardous specimens.
 - 2.2.3 Discuss in detail and perform proper infection control techniques, such as hand hygiene, gowning, gloving, masking, and double-bagging.
 - 2.2.4 Define and discuss the term "healthcare-acquired infection".

- 2.3 Comply with federal, state and locally mandated regulations regarding safety practices.
 - 2.3.1 Observe the OSHA Bloodborne Pathogens Standard and Needle Safety Precaution Act.
 - 2.3.2 Use prescribed procedures to handle electrical, radiation, biological and fire hazards.
 - 2.3.3 Use appropriate practices, as outlined in the OSHA Hazard Communications Standard, including the correct use of the Material Safety Data Sheet as directed.
- 2.4 Describe measures used to insure patient safety in various patient settings, i.e., inpatient, outpatient, pediatrics, etc.
- 3.00 Demonstrate basic understanding of the anatomy and physiology of body systems and anatomic terminology in order to relate major areas of the clinical laboratory to general pathologic conditions associated with the body systems.
 - 3.1 Describe the basic functions of each of the main body systems, and demonstrate basic knowledge of the circulatory, urinary, and other body systems necessary to perform assigned specimen collection tasks.
 - 3.2 Identify the veins of the arms and hands on which phlebotomy is performed.
 - 3.3 Explain the functions of the major constituents of blood, and differentiate between whole blood, serum and plasma.
 - 3.4 Define hemostasis.
 - 3.5 Describe the stages of coagulation.
 - 3.6 Discuss the properties of arterial blood, venous blood, and capillary blood.
- 4.00 Demonstrate understanding of the importance of specimen collection and specimen integrity in the delivery of patient care.
 - 4.1 Describe the legal and ethical importance of proper patient/sample identification.

- 4.2 Describe the types of patient specimens that are analyzed in the clinical laboratory.
 - 4.3 Define the phlebotomist's role in collecting and/or transporting these specimens to the laboratory.
 - 4.4 List the general criteria for suitability of a specimen for analysis, and reasons for specimen rejection or recollection.
 - 4.5 Explain the importance of timed, fasting and stat specimens, as related to specimen integrity and patient care.
- 5.00 Demonstrate knowledge of collection equipment, various types of additives used, special precautions necessary and substances that can interfere in clinical analysis of blood constituents.
- 5.1 Identify the various types of additives used in blood collection, and explain the reasons for their use.
 - 5.2 Identify the evacuated tube color codes associated with the additives.
 - 5.3 Describe the proper order of draw for specimen collections.
 - 5.4 Describe substances that can interfere in clinical analysis of blood constituents and ways in which the phlebotomist can help to avoid these occurrences.
 - 5.5 List and select the types of equipment needed to collect blood by venipuncture and capillary (dermal) puncture.
 - 5.6 Identify special precautions necessary during blood collections by venipuncture and capillary (dermal) puncture.
- 6.00 Follow standard operating procedures to collect specimens.
- 6.1 Identify potential sites for venipuncture and capillary (dermal) puncture.
 - 6.2 Differentiate between sterile and antiseptic techniques.
 - 6.3 Describe and demonstrate the steps in the preparation of a puncture site.

- 6.4 List the effects of tourniquet, hand squeezing and heating pads on specimens collected by venipuncture and capillary (dermal) puncture.
- 6.5 Recognize proper needle insertion and withdrawal techniques, including direction, angle, depth and aspiration, for venipuncture.
- 6.6 Describe and perform correct procedure for capillary (dermal) collection methods.
- 6.7 Describe the limitations and precautions of alternate collection sites for venipuncture and capillary (dermal) puncture.
- 6.8 Explain the causes of phlebotomy complications.
- 6.9 Describe signs and symptoms of physical problems that may occur during blood collection.
- 6.10 List the steps necessary to perform a venipuncture and a capillary (dermal) puncture in order.
- 6.11 Demonstrate a successful venipuncture following standard operating procedures.
- 6.12 Demonstrate a successful capillary (dermal) puncture following standard operating procedures.
- 7.00 Demonstrate understanding of requisitioning, specimen transport and specimen processing.
 - 7.1 Describe the process by which a request for a laboratory test is generated.
 - 7.2 Instruct patients in the proper collection and preservation for non-blood specimens.
 - 7.3 Explain methods for transporting and processing specimens for routine and special testing.
 - 7.4 Explain methods for processing and transporting specimens for testing at reference laboratories.
 - 7.5 Identify and report potential pre-analytical errors that may occur during specimen collection, labeling, transporting, and processing.

- 7.6 Describe and follow the criteria for collection and processing of specimens that will be used as legal evidence, i.e. paternity testing, chain of custody, blood alcohol levels, etc.
- 8.00 Demonstrate understanding of quality assurance and quality control in phlebotomy.
 - 8.1 Describe quality assurance in the collection of blood specimens.
 - 8.2 Identify policies and procedures used in the clinical laboratory to assure quality in the obtaining of blood specimens.
 - 8.2.1 Perform quality control procedures.
 - 8.2.2 Record quality control results.
 - 8.2.3 Identify and report control results that do not meet pre-determined criteria.
- 9.00 Communicate (verbally and nonverbally) effectively and appropriately in the workplace.
 - 9.1 Maintain confidentiality of privileged information on individuals, according to federal regulations (e.g. HIPAA).
 - 9.2 Demonstrate respect for diversity in the workplace.
 - 9.3 Interact appropriately and professionally.
 - 9.4 Demonstrate an understanding of the major points of the American Hospital Associations' Patient's Bill of Rights and the Patient's Bill of Rights from the workplace.
 - 9.5 Comply with the American Hospital Associations' Patient's Bill of Rights and the Patient's Bill of Rights from the workplace.
 - 9.6 Model professional appearance and appropriate behavior.
 - 9.7 Follow written and verbal instructions.
 - 9.8 Define and use medicolegal terms and discuss policies and protocol designed to avoid medicolegal problems.
 - 9.9 List the causes of stress in the work environment and discuss the coping skills used to deal with stress in the work environment.

9.9 Demonstrate ability to use computer information systems necessary to accomplish job functions.