

**Standards of Approved
Educational Programs
for the
Phlebotomist**

The Standards of Approved Educational Programs
for the Phlebotomist
are published by the
National Accrediting Agency for Clinical Laboratory Sciences
8410 West Bryn Mawr Avenue, Suite 670
Chicago, Illinois 60631-3415
773.714.8880 Phone
773.714.8886 Fax
info@naacls.org EMail
<http://www.naacls.org> Web Site

Adopted by the
National Accrediting Agency for Clinical Laboratory Sciences

Copyright 2001 NAACLS

Standards of Approved Educational Programs for Phlebotomy

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.

REQUIREMENTS FOR APPROVAL

I. SPONSORSHIP

1. Institutional Affiliation

The sponsoring institution must provide post-secondary education. The sponsoring institution and affiliates, if any, must be accredited by a recognized national, regional or state agency.

In programs in which the education is provided by two or more institutions, responsibilities of the sponsoring institution and of each affiliate for program administration, instruction, and supervision must be described in writing and signed by both parties. All provisions of the agreement must be active with written documentation of the following items:

A. General

1. Reason for agreement;
2. Responsibilities of the sponsoring Institution;
3. Responsibilities of the clinical affiliate, and;
4. Joint responsibilities.

B. Specific

1. Supervisory responsibilities for the students;
2. Student professional liability coverage;
3. Student health and safety policies;
4. Provision for renewal, and;
5. Termination clause providing for program completion of enrolled students.

2. Acceptable Institutions

Approved programs must be established in:

- A. colleges and universities;
- B. hospitals and medical centers;
- C. medical laboratories, and;
- D. other post-secondary institutions or consortia that meet comparable standards for education in phlebotomy.

3. Sponsoring Institution's Responsibilities

Approval is granted to the institution that assumes primary responsibility for curriculum planning and selection of course content, coordinates classroom teaching and supervised applied education, appoints faculty to the program, receives and processes applications for admission, and grants the certificate documenting completion of the program.

- A. The sponsoring institution or consortium must be responsible for providing assurance that the activities assigned to students in the clinical setting are educational.
- B. There must be documented ongoing communication between the sponsoring institution and its affiliates for exchange of information and coordination of the program. A

meeting must be held at least annually between representatives of the sponsoring institution or consortium and the affiliates.

II. RESOURCES

4. General Resources

Resources must support the number of students admitted into the program. The instructor/student ratio shall be adequate to achieve the stated goals of the program.

5. 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.

6. 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.

7. Financial Resources

Financial resources for continued operation of the program shall be ensured by an adequate, institutionally approved budget or by a statement of continued financial support from an executive officer of the sponsoring institution.

8. Physical Resources

A. Facilities

Classrooms, laboratories, administrative offices and other facilities must be adequate, equipped for safety, and must be in compliance with pertinent governmental laws.

B. Equipment and Supplies

Each student must have reasonable access to and experience with modern equipment and supplies.

C. Library

Each student must have reasonable access to information resources containing current editions of books, periodicals and other reference materials in contemporary formats related to all content areas of the curriculum.

D. Instructional Resources

Adequate instructional resources (such as clinical, reference, demonstration materials)

must be available to facilitate each student's attainment of entry level competencies. Reference materials may include videotapes, computer tutorial materials, audio/visual resources, and/or other multimedia resources.

III. CURRICULUM

9. 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 NAACLS Phlebotomist Competencies.

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. NAACLS Phlebotomist Competencies must be used to design didactic and applied experiences.

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.

IV. STUDENTS

10. Program Description/Publications

Students must be provided with a clear description of the program and its content and current publications, which must include:

- A. program mission statement;
- B. program goals and competencies;
- C. course objectives;
- D. applied education assignments (if applicable);
- E. admission criteria, both academic and non-academic;
- F. list of course descriptions;
- G. names and academic rank or title of the program director and faculty;
- H. tuition and fees with refund policies;
- I. dismissal policies and procedures;
- J. program rules and regulations;
- K. list of clinical facilities (if applicable),
- L. essential functions, and
- M. policies and procedures of placement when clinical placement cannot be guaranteed outside of established eligibility criteria.

11. Admissions

Admission of students, including advanced placement if available, must be made in accordance with the clearly defined and published practices of the institution. Specific academic standards and essential functions required for admission to the program must be clearly defined, published and provided to prospective students and made available to the public. The signature of the student indicating full understanding of the policies for progression in the program and completion of the program must be secured.

12. Acceptable Conduct

Rules and regulations governing acceptable personal and academic conduct must be defined and provided to all students upon entering the program.

13. Student Records

Student records must be maintained for admission, evaluation, and counseling or advising sessions. Individual grades and credits for courses must be recorded and permanently maintained by the sponsoring institution. The program must maintain the student records, conforming to any governmental regulations and the regulations of any other accrediting agencies.

14. Health and Safety

There must be a procedure for determining that each applicant's or student's health will permit the individual to meet the written essential functions of the program. Students must be informed of and have access to the usual student health care services of the institution. The health and safety of students, faculty, and patients associated with educational activities must be safeguarded. Emergency medical care must be available for students while in attendance.

15. Guidance

Guidance must be available to assist students in understanding and observing program policies and practices, for advising on professional and career issues, and for providing counseling or referral for personal and financial problems that may interfere with progress in the program. Confidentiality and impartiality must be maintained in dealing with student problems.

16. Appeal Procedures

Appeal procedures must be distributed to students upon entering the program. They must include provisions for academic and non-academic types of grievances and a mechanism for neutral evaluation that ensures due process and fair disposition.

V. OPERATIONAL POLICIES

17. Fair Practices

- A. Programmatic announcements must accurately reflect the program offered and include NAACLS' name, address and phone number.
- B. Student recruitment and admission must be non-discriminatory in accordance with existing governmental regulations and the regulations of any other accrediting agencies applicable to the institution.
- C. Faculty recruitment and employment practices must be non-discriminatory in accordance with existing governmental regulations and the regulations of any other accrediting agencies applicable to the institution.
- D. Academic credits and costs to the student must be accurately stated, published, and made known to all applicants.
- E. Policies and procedures for student withdrawal and refunds of tuition and fees must be published and made known to all applicants.

- F. If more than one clinical laboratory science program is offered at an institution, the sponsoring institution must demonstrate that each program is being conducted to assure appropriate instruction for the students at the different educational levels.
- G. The program must culminate in a formal certificate or other award recognizing completion of the program. The granting of this award must not be contingent upon the student passing any type of external certification or licensure examination.
- H. A written record of formal student complaints and resolution must be maintained.
- I. Program evaluation information, including program completion, placement and any certification pass rates must be made available to NAACLS upon request.

VI. PROGRAM EVALUATION

18. Systematic Review

There must be a mechanism for continually and systematically reviewing the effectiveness of the program to include survey and evaluation instruments that incorporate feedback from a combination of students, employers, didactic faculty, clinical faculty, graduates, exit or final examinations, and approval review.

19. Outcome Measures

A review of outcomes measures (e.g. results from external certifying examinations and/or of capstone projects) from the last three active years must be documented, analyzed and used in the program evaluation.

20. Graduation and Placement Rates

A review of program completion rates and placement rates must be documented, analyzed and used in the program evaluation.

21. Program Evaluation and Modification

The results of program evaluations must be documented and reflected in ongoing curriculum development and program modification, followed by an analysis of the effectiveness of any changes implemented.

VII. MAINTAINING APPROVAL

22. Program/Sponsoring Institution Responsibilities

Programs are required to comply with administrative requirements for maintaining approval, including:

- A. Submitting the Self-Study Report, an Application for Continuing Approval, or a required Progress Report as determined by NAACLS;

- B. Paying approval fees as determined by NAACLS;
- C. Informing NAACLS of relevant administrative and operational changes within 30 days. This includes changes in program official names, addresses or telephone numbers; affiliates, status (e.g., inactivity, closure) or location; and institution name;
- D. Completing an Annual Report prescribed by NAACLS and returning it by the established deadline, and;
- E. Verifying compliance with these Standards upon request from NAACLS.