



PHLEBOTOMY

TRAINING SPECIALISTS

Ohio Course Catalog

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Independence, OH 44131
Registration NO. 2102

5900 Roche Drive, Suite 115,
Columbus, OH 43229
Registration NO. 2168

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Registration NO. 2204

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701-404-9434

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Table Of Contents

Introduction	4
School History	5
Mission and Objectives	5
Administration	6
Faculty	6
Contact Information	6
Programs Offered	7
Program Cost	7
Payment Policy	7
Financing Options	8
Student Loans	8
Supplies & Equipment	8
Class Schedule	8
2024 Class Dates and Application Deadlines	9
Entrance Requirements	11
Admission Application and Deadline	11
Postponement of Start Date	12
Employment Advisory Services	12
Attendance Requirements	13
Make-up Time	13
Rescheduling/Readmittance	14
Scheduled Absence(s)	14
Completion Policy	14
Progress Policy	15
Grading System	15
Graduation and Certificate of Training Requirements	15
Student Performance, Remediation, and Academic Dismissal Policy	16
Records	17
Dress Code	17
Leave of Absence	17
Conduct & Dismissal Policy	17
Warnings & Suspension	19
Re-entry / Readmission	19

Student Probation	20
Voluntary Withdrawal From Class	20
Student Rights	20
Facilities and Equipment	20
Educational Services	21
Previous Credits	21
Transfer of Credits & State to State Transfer	21
Student Grievance Procedure	22
Cancellation & Refund Policy	22
Student Eligibility, Accommodations, and Performance Policy	24
2024 PHLEBOTOMY TRAINING SYLLABUS	24
TOPICS / UNITS	26
Procedures List:	27
Program Competencies:	27
Textbook	34
Holder in Due Course Statement	34
Accreditation Status	34

Introduction

Phlebotomy Training Specialists (hereinafter referred to as PTS) offers Phlebotomy Training and Certification for students and is staffed with qualified, approved, instructors. Brian Treu is the Chief Executive Officer (hereinafter referred to as CEO) of PTS. Mr. Treu has been drawing blood for 23 years and has completed over 300,000 blood draws during his career. He serves as a subject matter expert for many certification agencies. His career in medicine includes completing 255 clinical research trials in Phases I-IV in all facets of medicine, specializing in Phase I clinical trials. Mr. Treu loves pressure and has an uncanny way of dealing with stressful situations. He has traveled the world performing venipuncture on patients on all 7 continents.

Alexis Treu is the Chief Operations Officer (hereinafter referred to as COO) of PTS. Ms. Treu has broad experience as the Chief Operating Officer level, having served in this capacity since 2017. Her extensive understanding of career school operational functions, as well as that of diverse and complicated state licensure requirements enables her to ensure full program compliance across the country.

David Roberts is the Chief Financial Officer (hereinafter referred to as CFO). Mr. Roberts's responsibilities are to ensure the company is operating in Generally Accepted Accounting Principles (GAAP) manner. He coordinates and manages all finance functions within the company; and, manages operational and investor relationships to ensure the company is operating in a legal and ethical manner. Mr. Roberts has an extensive background in supporting companies through post-sale transactions ensuring smooth and efficient operations. He has been a CFO for 10 years. Before his CFO duties, he has held numerous senior-level positions in both financial planning and analysis (FP&A) roles and in back-office controllership roles. He has an undergraduate degree in finance and a Master's in Business Administration (Finance) from the University of Utah.

Dina Said Dwyer fills the role of Acting Chair of PTS and is the CEO and President of Eden PTS Holdco LLC. Ms. Dwyer has spent over 20 years in the private equity industry. Prior to founding Eden Capital, she served as a Managing Director at Unifund SA, as an Analyst at the Blackstone Group in New York, and trained at the Carlyle Group in London. She currently sits on the Board of Directors of Wall Street Prep, Etcetera, and White Cup. Ms. Dwyer is a graduate of the Wharton School of the University of Pennsylvania and received her MBA at the Columbia Business School.

School History

Phlebotomy Training Specialists (hereinafter referred to as the school) offers Phlebotomy Training for students and is staffed with qualified instructors. Mr. Treu recognized a need in the phlebotomy industry for hands-on training, so he founded Phlebotomy Training Specialists and created a program to combine a system that consists of both practical and didactic learning. Students can leave the program feeling confident in their ability to enter the workforce as a phlebotomist. Since Phlebotomy Training Specialists inaugural class in 1993, the company has had over 87,000 graduates. Today Phlebotomy Training Specialists is one of the largest stand-alone phlebotomy training schools.

Mission and Objectives

Our mission is to increase the quality of the patient experience in the laboratory setting by delivering & implementing standardized, and consistently updated, training methodologies to students before their entrance into the clinical setting through our network of training facilities, which use the latest training paradigms and state of the art equipment.

Our objective is to turn out high-quality, well-trained, competent phlebotomists who can use their skills to benefit patients and employers.

Our current program meets the stated purpose above through a rigorous academic curriculum and hands-on training. Our program equips students with the knowledge, technical proficiency, and foundation needed to excel. By preparing our students to provide safe, accurate, and compassionate blood collection draws, the program fulfills our mission.

Administration

Brian Treu - CEO & Owner
Alexis Treu - COO
David Roberts – CFO
Adrienne Current- Bookkeeping
Monica Sanborn - State Licensing Administrator
Heidi Samani- Director of Student Services
Ericha Dick- Directors of Training

Faculty

<u>Name</u>	<u>Location</u>	<u>Position</u>
Myaa Bryant	<u>Cincinnati</u>	<u>AM</u>
Amy Monhollen-Hall	<u>Cincinnati</u>	<u>PM</u>
Sarah Gavina	<u>Cincinnati</u>	<u>WKD</u>
Robin Hughes	<u>Cincinnati</u>	<u>WKD</u>
Billie Jackson	<u>Columbus</u>	<u>PM</u>
Mary Angeline	<u>Columbus</u>	<u>WKD</u>
Kimberly Hopkins	<u>Columbus / Independence</u>	<u>PM</u>
Dylanne Orlik	<u>Independence</u>	<u>AM/WKD</u>
Kymberly Suber	<u>Independence</u>	<u>PM</u>

Contact Information

School Addresses:

Cincinnati- 4675 Cornell Rd, Suite 185, Cincinnati, OH 45241

Columbus- 5900 Roche Dr, suite 115, Columbus, OH 43229

Independence- 4700 Rockside Rd, Suite 140, Independence, OH 44131

Home Office- 1971 W. 700 N. Suite 102 Lindon, UT 84042

Phone: **701-404-9434** Fax: **385-327-2084**

Email: info@phlebotomyusa.com

Website: www.phlebotomyusa.com

Programs Offered

1 Certificate Program: Phlebotomy Technician Training

Program Length: 40 Hour

Program Cost

<u>Tuition</u>	<u>Registration</u>	<u>Books/Supplies/ Equipment</u>	<u>Total Tuition/Fee</u>	<u>National Exam</u>
\$475.00	\$100.00	\$135.00	\$710.00	\$115.00 (paid to a third party)

Total for Phlebotomy Training Program & Exam = \$825.00

Payment Policy

Tuition and fees for class can be paid by logging into your student account at students.phlebotomyusa.com. We accept all major credit cards. A \$100 minimum is required at the time of registration. After the initial registration fee of \$100 has been paid, students can make payments in any increment until full payment is received.

Full tuition and fees are due by the halfway point of the class.

If a student fails to pay full tuition and fees by these deadlines, the following options are available:

1. If a student wishes to remain in the class they originally registered for and are unable to meet the payment policy as written, they can request a payment extension. They will need to make a written request to Alexis Treu, COO, at info@phlebotomyusa.com. She will review all payment extensions. If an extension is approved, the student will remain in their scheduled program but will be required to pay in full before challenging the practical or national exam.
2. If a student does not contact the Ms. Treu the student will be required to reenroll in new class dates where they will attend the remaining classes in that cohort to complete their program. They will be required to be paid by the halfway point of their new cohort. Extensions past this point will not be permitted. Students should call Student Services to reschedule. Please note rescheduling will be based on class availability.

No student, regardless of circumstance, will be permitted to be certified without full payment. PTS does not hold regional, national, or programmatic accreditation from a U.S. Department of Education-approved accreditor. PTS does not participate in federal or state student aid programs.

Financing Options

Students may apply for financing with Monterey Financial via the student portal, upon request. Students may apply for financing at any point throughout the program, and they may choose to finance up to 50% of their overall balance. Students may select terms in 12, 18, or 24 months at a rate of 18%. Should students withdraw from the program, the published refund policy would apply.

Third-party loans must be repaid according to the terms of the note even if the borrower does not complete his or her education, cannot get a job after completion of the program, or is dissatisfied with the education

Student Loans

Phlebotomy Training Specialists does not qualify for Title IV student loans and does not provide student loans.

Supplies & Equipment

Supplies and Equipment: \$100.00 – Refundable on a pro rata basis in accordance with tuition.

Textbook: \$35.00 – Once textbooks are issued and received by students, these become the property of students and no refunds will be issued.

Exam Fee: \$115.00 – Refundable if not taken.

Class Schedule

Evening: 6 pm to 10 pm – Monday – Thursday (10 Classes)

Day: 9am to 1:00pm – Monday – Thursday (10 Classes)

Weekend: 8 am – 4:30 pm Saturdays (5 Classes)

2024 Class Dates and Application Deadlines

Month / Class	Dates of each Class	Application Deadline
Jan Day	16, 17, 18, 22, 23, 24, 25, 29, 30, 31	January 9th
Jan Eve	16, 17, 18, 22, 23, 24, 25, 29, 30, 31	January 9th
Jan Weekend	6, 13, 20, 27, 3	December 1st
Feb Day	12, 13, 14, 15, 20, 21, 22, 26, 27, 28	February 5th
Feb Eve	12, 13, 14, 15, 20, 21, 22, 26, 27, 28	February 5th
Feb / Mar Weekend	10, 17, 24, March 2, 9	February 5th
Mar Day	13, 14, 18, 19, 20, 21, 25, 26, 27, 28	March 6th
Mar Eve	13, 14, 18, 19, 20, 21, 25, 26, 27, 28	March 6th
Mar / Apr Weekend	23, 30, April 6, 13, 20	March 18th
April Day	8, 9, 10, 11, 15, 16, 17, 18, 22, 23	April 1st
Apr Eve	8, 9, 10, 11, 15, 16, 17, 18, 22, 23	April 1st
May Day	8, 9, 13, 14, 15, 16, 20, 21, 22, 23	May 1st
May Eve	8, 9, 13, 14, 15, 16, 20, 21, 22, 23	May 1st
May / June Weekend	4, 11, 18, June 1, 8	April 29th
June Day	5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 29th
June Eve	5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 29th

June / July Weekend	22, 29, July 6, 13, 20	June 17th
July Day	15, 16, 17, 18, 22, 23, 24, 25, 29, 30	July 8th
July Eve	15, 16, 17, 18, 22, 23, 24, 25, 29, 30	July 8th
July / Aug Weekend	27, August 3, 10, 17, 24	July 22nd
Aug Day	12, 13, 14, 15, 19, 20, 21, 22, 26, 27	August 5th
Aug Eve	12, 13, 14, 15, 19, 20, 21, 22, 26, 27	August 5th
Sept Day	16, 17, 18, 19, 23, 24, 25, 26, 30, Oct 1	September 9th
Sept Eve	16, 17, 18, 19, 23, 24, 25, 26, 30, Oct 1	September 9th
Sept / Oct Weekend	7, 14, 21, 28, October 5	September 2nd
Oct Day	15, 16, 17, 21, 22, 23, 24, 28, 29, 30	October 8th
Oct Eve	15, 16, 17, 21, 22, 23, 24, 28, 29, 30	October 8th
Oct / Nov Weekend	19, 26, November 2, 9, 16	October 14th
Nov Day	5, 6, 7, 12, 13, 14, 18, 19, 20, 21	October 29th
Nov Eve	5, 6, 7, 12, 13, 14, 18, 19, 20, 21	October 29th
Nov / Dec Weekend	23, 30, December 7, 14, 21	November 18th
Dec Day	4, 5, 9, 10, 11, 12, 16, 17, 18, 19	November 27th
Dec Eve	4, 5, 9, 10, 11, 12, 16, 17, 18, 19	November 27th

When an unexpected closure occurs due to extraordinary conditions, including inclement weather, students will be notified as soon as possible by phone call and text message. Classes are not held on the following holidays:

- New Year's Eve
- Labor Day
- New Year's Day
- Thanksgiving Day & the Friday following
- Memorial Day
- Christmas Eve / Day
- Independence Day

Entrance Requirements

The school does not discriminate based on race, sexual orientation, gender identity, religion, ethnic origin, or disability.

Phlebotomy Training Specialists is conducting training sessions as a post-secondary education facility. Therefore, we do not require that students who enroll in the program possess a minimum of a high school diploma, General Education Development (GED) Certificate. Students must be beyond the age of compulsory high school attendance; over 18 years old.

Students must demonstrate fluency in English, including the ability to communicate, write, and read fluently, as this is essential for effective communication in the healthcare environment.

We do not require students to have previous medical experience or knowledge. Immunizations are not required to take the program. An informal interview will be given to discuss student goals and expectations. Prospective students will need to enroll by the application deadline. The application can be accessed on our website at www.PhlebotomyUSA.com. The application for attendance will be processed within 5 business days of submission, and the student will be notified by email.

Although basic computer skills are not required for the program, it is highly encouraged for students to have a basic knowledge of computer skills before coming to class, to make them more competitive candidates for employment upon completion of the program.

Admission Application and Deadline

Prospective students will need to enroll by the application deadline. The application deadline is five (5) days before the class starts. The application can be accessed on our website at www.PhlebotomyUSA.com. The application for attendance will be processed within 5 business days of submission, and the student will be notified by

email. Late enrollments are not accepted once the program has begun, and students will be notified and given dates of upcoming classes to choose from.

Postponement of Start Date

Postponement of a starting date requires a written agreement signed by the student and the school. The agreement must set forth:

- a. Reason for postponement request.
- b. A deadline for the new start date.

If the program is not commenced, or the student fails to attend by the new start date set forth in the agreement, the student will be entitled to a full refund of prepaid tuition and fees except for the \$100 non-refundable registration fee. All refunds will be processed within 30 days of the deadline of the new start date, determined in accordance with the school's refund policy.

Employment Advisory Services

Phlebotomy Training Specialists **do not** provide any formal placement into employment opportunities. **Placement in a job is not guaranteed or promised to persons who complete the program.** To that end, we do not leave the students on their own to find employment.

We do the following for students:

Market Sectors – We provide each student with a list of local sectors of the economy that employ Phlebotomists consistently. We do not provide student referrals to prospective employers and we do not have direct contact with employers regarding current job openings.

This list includes but is not limited to, Plasma Centers, Blood Banks, Platelet Donation, Dialysis, Physicians' Offices, Medical Clinics, Laboratories, Hospitals, and Paramedical examinations to name a few. This gives the student a head-start on where to look for employment.

Resume Writing – All students will be encouraged to send in their resumes to our on-staff professional resume writers. The writers will then assist the students with fine-tuning their resume(s) by way of suggestion(s). The writers will also assist the students with putting their resume(s) into a medical format called a Curriculum Vitae.

Interview Preparation – We have a presentation done during class where we discuss interviewing. We also speak to the students regarding the application process for jobs, what to expect during the interview process, and a list of tough questions they will be asked.

Continual Training – All students, once they have completely attended and have paid in full, are allowed to return to the class, free of charge, to keep their skills sharp and to prepare for interviews.

Additionally, we have a *Student Helpline* where students can call with questions regarding Phlebotomy Training, the application process, help with interviewing, job sources, and Phlebotomy-related inquiries.

Attendance Requirements

Attendance is mandatory for all students regardless of their current level of knowledge. This course is not graded, it is a pass/fail course. Because of this, lack of attendance can affect the student's ability to pass. This course is comprised of 10 four-hour modules. In order to complete the class and receive a certificate of completion, students must attend at least 9 out of 10 modules. If students miss more than 1 module throughout the class, they will be required to make up the modules they missed in an alternate schedule. If students miss three *consecutive* modules, they will be deemed too far behind the class, and will be automatically removed from the class and required to enroll for another schedule.

Please note that modules 1, 2, and 9 are required to complete the course, as these modules contain foundational information (1 & 2) and the practical exam (9).

There is a 30-minute grace period at each class after which the student will be considered tardy and that time will have to be made up in 60-minute increments. Time will be quantified at the educational facility electronically, and the student must attend all of the time. If a student misses a portion of class after commencement, they can make it up in an alternate schedule, assuming they comply with completion deadlines. Make up time is available by contacting Student Services at 701-404-9434.

Make-up Time

Students are strongly advised not to miss class unless necessary. If a student misses a portion of class after the initial 8 hours, the student can make it up at any of the other modules that are teaching the same class during days, evenings, or weekends. Make-up time is available by contacting student services at 701-404-9434 or by emailing info@phlebotomyusa.com. It is the student's responsibility to schedule and attend any make-up time. If the missed module cannot be made up during the scheduled month, the student can schedule a make-up time during the next month the module is being taught. There is no fee for make-up classes. **Please call Student Services at 701-404-9434 to reschedule.**

However, if the student is absent from three (3) or more class sessions without prior notice and authorization, enrollment will be dropped.

Rescheduling/Readmittance

If a student is dropped from the program due to non-payment of tuition and fees by the halfway mark of their scheduled cohort, they will need to contact Student Services at (701) 404-9434 to pay in FULL and reschedule missed classes. Rescheduling will be based on class availability.

Scheduled Absence(s)

If any student has extenuating circumstances and requires an absence, please directly notify and speak with your school director for authorization. Once authorized, the student will be allowed to make up the missed time during the next month when the class covers the missed content with no additional fees.

Completion Policy

Students will have 90 days to receive their Certificate of Completion from the original course start date (decided at the time of registration). All payments made towards tuition and fees are only applicable to courses held within the dates below.

Re-enrollment

Should students fail receive their Certificate of Completion during this time frame, they will be required to re-enroll as a new student. No payments made or classes attended will carry over to this new enrollment. Students may re-enroll and make payments via the student portal or by contacting Student Services at (701) 404-9434.

Extension Policy

Students may request an extension for extenuating circumstances by contacting Student Services at info@phlebotomyusa.com. Extension requests can be made for obtaining their Certificates of Completion. All requests must be sent in writing. Requests for extensions must be submitted prior to the Completion Deadline. Extensions will be granted for emergency situations such as severe medical issues, death of a relative, natural disasters, and cases of assault. All balances must be paid in full before extensions will be granted. Extensions are not to exceed more than 30 days of the original completion deadline. No more than one extension will be granted per student. This enrollment agreement is valid for Extensions granted by the school.

Automatic Extensions will be granted for a) the school rescheduling course dates past the Completion Deadline, and b) the school rescheduling course dates past the expiration of the extension period.

Completion Timelines for Exam

The \$115 exam fee covers all exam attempts during the above period. After the Completion Deadline, any exam attempt will be charged to the student at \$115. No extensions will be offered for exam attempts.

Progress Policy

Phlebotomy Training Specialists and instructors are completely immersed in student success. Our instructor cadre is face-to-face with students every day they attend class. Our class sizes are kept small to ensure the student gets all the attention from the instructor and classmate interactions they need to become successful in Phlebotomy.

The program is not graded, it is a pass/fail program. As the program progresses the instructors determine through quizzes in each section and the hands-on skills of the students if they are keeping up with the rest of the class.

Grading System

Class 1	Introduction to Phlebotomy	Pass / Fail
Class 2	Lab Skills Development – First Blood Draws	Pass / Fail
Class 3	Specimen Collection and Order of the Draw	Pass / Fail
Class 4	Lab Skills Development – Dermal Sticks and Butterfly Needles	Pass / Fail
Class 5	Lab processing and PRP	Pass / Fail
Class 6	Lab Skills & Development- Centrifuge & Dermal Sticks	Pass / Fail
Class 7	Infection Control & Anatomy	Pass / Fail
Class 8	Lab Skills Development- Hands-On Practice/Activity	Pass / Fail
Class 9	Practical Exam	Pass / Fail
Class 10	National Exam	Pass / Fail

Graduation and Certificate of Training Requirements

Certificates of Completion will ONLY be awarded to students at the last class who have accomplished the following:

- Passing Scores in Didactic Coursework
- Passing Scores in Lab Coursework
- Passing Scores in Venipuncture Hands-on skills
- Completed Student File / Paperwork
- No outstanding payment obligations

Students complete a final practical evaluation during the last hands-on day of the program. The test will include knowledge of tubes, additives, order of draw, and the ability to complete each step-in order and without correction. Completion of 4 successful draws (2 arm and 2 hand) is mandatory, along with full attendance and full payment of tuition for graduation. In addition, Students must be able to communicate and demonstrate proficiency in the practice of phlebotomy without assistance. This includes the ability to perform blood draws safely and successfully. We do not mail original copies of the Certificate of Training. If the student would like one sent to them, they can have one printed and mailed directly from our Corporate Offices for a fee of \$20.00. Please log on to the student portal to request and pay for the printed and mailed Certificate. If the student notices any mistakes on their Certificate, please email documents@phlebotomyusa.com.

Students who complete the 40-hour program and pass the exam administered by the National Healthcare Certification Organization, will be eligible for employment in all states. Some states, such as California, Louisiana, Nevada, and Washington have additional licensing requirements.

Student Performance, Remediation, and Academic Dismissal Policy

Student Performance

The Phlebotomy Program is a fast-paced, often stressful, learning environment that demands a high level of dedication and proficiency. Students are expected to meet all program requirements, including classroom attendance, participation, and the ability to demonstrate proficiency in blood draws.

If a student's performance falls below the expected standards, the institution will initiate a conversation with the student to discuss their challenges and provide guidance on improving their performance.

Remediation

Remedial training is provided if it is found that a student is not progressing. The remediation period is limited to the length of the next class or classes depending on student needs. If the student achieves a 70% on modules, the student will resume with a pass status. Second and final remediation is available if needed. The student must be able to attend the required classes in the next schedule or concurrent schedule to receive additional training and help. Students are allowed to attend the weekend/evening/day classes, free of charge. If a student is unable to complete

remediation in the scheduled time, they will consult with the chief administrator regarding re-enrollment options.
Dismissal

If, after reasonable efforts to support the student's success, they continue to fail to meet the program's requirements and remediation required, the institution may be required to dismiss the student from the Phlebotomy Program. Dismissal will be a last resort and will only occur after due consideration of the student's circumstances.

Records

Student records are maintained digitally indefinitely and can be accessed at the school; transcripts are kept permanently. Students have a right to access their records anytime. A student can access records by logging on to their student portal students.phlebotomyusa.com. Only the student and the school administration have a right to review student records. No outside personnel will be allowed to view records, except for appropriate state regulatory representatives upon request. Student academic, financial, certificates, and transcripts are all electronically maintained.

For a copy of your transcripts, please email a written request to info@phlebotomyusa.com. There is no fee for a copy of your transcript. The school reserves the right to withhold an official transcript if the student's financial obligation to the school is in arrears.

Dress Code

Scrubs are strongly suggested. Closed-toed shoes are mandatory, no sandals or open-toed shoes.

Leave of Absence

Due to the short period of time required to complete the program, Phlebotomy Training Specialists will not grant students a Leave of Absence. In the case of a prolonged illness or accident, death in the family, or other special circumstances that make attendance impossible or impractical, the student will be required to withdraw from the program. The school will process an appropriate refund in accordance with the Refund Policy.

Conduct & Dismissal Policy

If a student is dismissed permanently, the refund policy will be in effect based on the percentage of class attended. The last session of attendance will be the date of dismissal. Students are expected to maintain professional conduct within the classroom. Phlebotomy Training Specialists reserve the right to enact disciplinary procedures (outlined below). The following is a list of enumerating behaviors that are unacceptable in the classroom setting. These examples of impermissible behavior

described below are not intended to be an all-inclusive list. Phlebotomy Training Specialists managers have full discretion and any violation of the policies or conduct considered inappropriate or unsatisfactory will be subject to disciplinary action, up to and including dismissal from the program.

1. **Language / Interpersonal Conduct**

- a. Fighting (verbal, physical, electronic) with or assaulting another individual
- b. Threatening or intimidating any other individual by any method (verbal, written, electronic, etc.)
- c. Engaging in any form of harassment (sexual, emotional, etc.)
- d. Using vulgar language, explicit terms, or profanities
- e. Discussing sensitive topics such as religion, sexual orientation, gender, racial issues, political affiliation, etc.

2. **Conduct**

- a. Use of cell phone for non-emergencies while in class and/or lab
- b. Continually speaking out of turn or disrupting the flow of class with off-topic discussions
- c. Arriving late to class or leaving early more than twice without prior notification.

3. **Safety**

- a. Failing to abide by safety rules and policies
- b. Refusing to follow the instructor's directions or being insubordinate
- c. Failure to adhere to corrections or guidance given by the instructor
- d. Continued disregard for cleanliness and sanitation protocols

4. **Mental/Physical State**

- a. Showing up to class in improper attire, wearing inappropriate shoes, or generally unkempt
- b. Attending class while under the influence of alcohol, illicit drugs, or any other mind/body-altering substance. (This includes Prescription and/or recreational drugs).

5. **Student Eligibility, Accommodations, & Performance**

- a. Failure to meet the performance requirements
- b. Inability to benefit as reviewed by instructional staff, regional, and national directors

6. **Automatic Dismissal**

- a. Possessing firearms or any other weapons in the classroom
- b. Illegal Activity of any kind
- c. Using, selling, dispensing, or possessing alcohol, illegal drugs, or narcotics on-premises. Recreational drugs are also not permitted on-premises.
- d. Theft
- e. Being absent for the first 8 hours of the program

Dismissal Procedures:

Upon infraction of one of the above prohibitions, a Phlebotomy Training Specialists staff member will issue a verbal and written warning to the student. This is to be considered a corrective plan of action. If the prohibited action and/or behavior continues, Phlebotomy Training Specialists will dismiss the infracting student(s) from the program. Any student who has violated the prohibitions outlined in section 5, the "Automatic Dismissal" section, will be subject to automatic dismissal with no exception(s).

All dismissal procedures will be determined by at least three Phlebotomy Training Specialists management team members, including a consultation with the issuing staff member. Any student who wishes to appeal Phlebotomy Training Specialists' final decision, shall do so in writing. Any dismissed student may attain reentry into the program(s) by contacting the schools COO, Alexis Treu, and discussing with her on an individual basis, our expected classroom etiquette.

Warnings & Suspension

Students will be given written warnings when it comes to their conduct in class. If they are disruptive, harass, or discriminate against another student or instructor, they will be written up by their instructor.

Three times being written up will result in suspension from the class. If the student chooses to withdraw from the class AFTER their suspension from the class, the student's tuition will be refunded based on the last day attended and will be based on the refund policy contained herein.

When suspended from a class, a student may not re-enter the class in which they were enrolled, until the start of the next month, they can however attend any other class, such as the evening or weekend class if they were in the day class. If they wish to re-enter at the same time of class as they were originally enrolled, they must wait until the start of the next class, the next month.

Re-entry / Readmission

Upon infraction of one of the above expectations, a Phlebotomy Training Specialists staff member will issue a verbal and written warning to the student. This is to be

considered a corrective plan of action. Students get three warnings, and on the fourth incident, they are suspended from class, as stated previously. Students who want to gain re-entry into the class after suspension will have to submit a request to the PTS corporate offices. PTS Corporate offices will take 48 hours to determine eligibility. This may result in a call to the student to discuss the issues at hand. A student that is suspended may only gain re-entry into the class one time. If the impermissible behavior continues, Phlebotomy Training Specialists will dismiss students from the program. Students who have violated policies outlined in the "Automatic Dismissal" section will be subject to automatic dismissal.

Student Probation

Phlebotomy Training Specialists do not put students on probation.

Voluntary Withdrawal From Class

When a student voluntarily withdraws from the program, the school will process a refund in accordance with the refund policy outlined in this document. All requests to withdraw must be submitted in writing to payments@phlebotomyusa.com.

Student Rights

Phlebotomy Training Specialists affords its students the following rights:

- Access to instructors and management for any assistance
- Fair and impartial treatment
- Providing Privacy to Student Records

Facilities and Equipment

Our schools are located at:

School Addresses:

Cincinnati- 4675 Cornell Rd, Suite 185, Cincinnati, OH 45241

Columbus- 5900 Roche Dr, suite 115, Columbus, OH 43229

Independence- 4700 Rockside Rd, Suite 140, Independence, OH 44131

Students will have hands-on training on modern medical equipment and informative lectures. Large whiteboards, televisions, diagrams, and videos will be provided to enhance classroom activities and didactic learning. The classroom is well-lit, air-conditioned, heated, ventilated, and appropriate for an educational site. Parking is sufficient and conveniently located nearby. Phlebotomy Training Specialists does not provide housing or transportation.

The facility and equipment used fully comply with all federal, state, and local ordinances and regulations, including the requirements for fire safety, building safety, handicaps, access, and health.

Educational Services

The Phlebotomy Training program objectives are to prepare students to collect blood samples by venesection. The objective of this class is to prepare students to collect blood samples by phlebotomy to be equipped for an occupation in the medical field.

The class is 40 hours in length, either during the day, evening or on weekends. There is no distance education for this class. All the instruction is classroom instruction, and there are no additional fees to make up classes because we allow all students to return to the class free of charge once they have completed the class one time.

To successfully complete this program, each student will be required to satisfactorily perform the tasks correlated to the function in which they are training. The final written exam is optional but strongly suggested. One watch and critique test will be given. If the entire program is completed satisfactorily, a certificate of completion will be awarded to the student after the program ends.

Previous Credits

Phlebotomy Training Specialists does not grant credit to students for other courses taken in the field of Phlebotomy, Nursing Assistant Training, or any other field. This program is a stand-alone program, and no reduced tuition, nor will reduced hours of participation be given.

Transfer of Credits & State to State Transfer

The transferability of credit and credentials earned is at the sole discretion of the receiving school. Acceptance of the certificate students earn in Phlebotomy is also at the complete discretion of the institution to which they may transfer. If the certificate is not accepted at the institution to which students may transfer, they may be required to repeat some or all of their coursework at that institution. For this reason, students should make certain that the program with Phlebotomy Training Specialists will meet their educational goals.

In addition, the tuition and fees paid toward this enrollment and course is only applicable to the city and state of the original enrollment; they are not transferable. If a student moves campuses, additional course fees may be required.

Student Grievance Procedure

Should a student have a complaint with Phlebotomy Training Specialists, then the following steps shall be taken by him/her. Students will not be subject to unfair actions as a result of filing a complaint.

1. The student shall first attempt to address the grievance informally with the instructor or applicable staff member and try to resolve it. If unsuccessful, proceed to the written grievance procedure.
2. Students may state the grievance in writing to the administrator or designee. Please submit the written request within **60 days** of the occurrence to the COO, Alexis Treu info@phlebotomyusa.com or 701-404-9434, she will assist you in resolving your concerns. She will investigate the grievance within 5 business days of receiving the complaint by contacting the student via email or phone to set up a meeting. In the meeting, Ms. Treu will discuss the complaint, allow the student to be heard, and discuss an amicable resolution to the complaint. Written notification of the resolution will be sent via email to the student within 10 days after the student meeting.
3. In her absence, you can contact the Student Service Manager at info@phlebotomyusa.com or **801-669-2056**. They will contact the student within 5 days or receive the complaint via email or phone to set up a meeting. In the meeting, they will discuss the complaint, allow the student to be heard, and discuss an amicable resolution to the complaint. The Student Services Manager will consult with the School/Company President and written notification via email of the resolution will be sent to the student within 10 days after the meeting.
4. If the student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Board of Higher Education within six months after the violations were committed. The complaint should be filed in writing and signed by the complainant. 30 East Broad Street, Suite 2481, Columbus, OH 43215

Contact Information for the Board of Education:

30 East Broad Street, Suite 2481,
Columbus, OH 43215
877-275-4219

Cancellation & Refund Policy

If the student is not accepted into the training program, all monies paid by the student shall be refunded. Refunds for books, supplies and consumable fees shall be made in accordance with Ohio Administrative Code section 3332-1-10.1. There is

one (1) academic term for this program that is 40 clock hours in length. Refunds for tuition and refundable fees shall be made in accordance with following provisions as established by Ohio Administrative Code section 3332-1-10:

An enrollment agreement or school application may be canceled within five calendar days after the date of signing provided the school is notified of the cancellation in writing. If a student withdraws from class after the five-day cancellation period, the school will retain the registration fee. All tuition and fees paid pursuant to the enrollment agreement or application will be refunded. Refunds will be processed within 30 days after the cancellation. This will provision shall not apply where a student has already started classes.

A student choosing to withdraw from the school is to provide written notice to the school or by sending an email to payments@phlebotomyusa.com.

In the case that a student quits attending class OR requests a refund after the five-calendar day period, we will refund based on student's last date of attendance. (Amount to be refunded is based on FULL tuition being paid, if full tuition was not paid in full the amount to be refunded will be based on total paid over percentage of amount to be refunded).

Attended up to 4 hours (1 AM/PM Class or 1/2 Weekend Class)	75% full tuition/fees amount less registration fee
Attended up to 8 hours (2 AM/PM Classes or 1 Weekend Class)	60% full tuition/fees amount less registration fee
Attended up to 12 hours (3 AM/PM Classes or 1 1/2 Weekend Classes)	45% full tuition/fees amount less registration fee
Attended up to 16 hours (4 AM/PM Classes or 2 Weekend Classes)	30% full tuition/fees amount less registration fee
Attended up to 20 hours or more	No Refund

The calculations above are based on full tuition being paid. If a student is not paid in full, the amount refunded will be proportional to tuition paid and classes attended. The \$115 National Exam Fee is not included in these calculations, as the exam fee is fully refundable as long as the National Exam is not attempted.

Refunds will only be issued back to the original card used in the transaction. If the card is no longer active, we can send a check which will require a 3% processing fee, and can only be issued to the original card holder.

Supplies and Equipment: \$100 - Refundable on a pro rata basis in accordance with tuition.

Textbook: \$35 - Once textbooks are issued and received by students, these become the property of students and no refunds will be issued.

Student Eligibility, Accommodations, and Performance Policy

Intelvio is committed to providing equal educational opportunities to all students, including those with disabilities, in compliance with the Americans with Disabilities Act (ADA). This policy outlines our commitment to inclusivity while maintaining the necessary standards for students participating in the Phlebotomy Program.

Intelvio does not discriminate on the basis of disability and is committed to providing reasonable accommodations to qualified students with disabilities to ensure equal access to educational programs and activities.

Accommodations

Intelvio is committed to providing reasonable accommodations to students with disabilities to facilitate their participation in the Phlebotomy Program. Accommodations will be determined on a case-by-case basis in consultation with the student and the institution's Student Services.

Chaperones

Chaperones or personal assistants are not allowed in the Phlebotomy Program classroom to assist students during the program. All students are expected to participate independently and demonstrate proficiency.

Assessment and Reasonable Modification

Students' abilities to successfully participate in the Phlebotomy Program will be assessed based on their performance in the classroom and if applicable, the clinical settings. This includes their ability to perform blood draws safely and effectively.

Intelvio may consider reasonable modifications to accommodate students with disabilities, provided that such modifications do not fundamentally alter the essential requirements of the Phlebotomy Program or compromise patient safety.

2024 PHLEBOTOMY TRAINING SYLLABUS

A. PROGRAM DESCRIPTION:

The Phlebotomy program is designed to train individuals to properly collect and process blood and other clinical specimens for laboratory testing and to interact with healthcare personnel, clients, and the general public. The presentation includes equipment and additives, basic anatomy, and safe and effective

venipuncture techniques. Emphasis will be placed on collection techniques, specimen processing, workflow practices, referrals, and utilizing laboratory information systems.

Our average faculty-to-student ratio is 1:16. Our maximum class capacity is 20, so during those times, the ratio is 1:20.

B. METHOD OF INSTRUCTION:

The student is trained through the modules during class, obtaining that knowledge through books and hands-on training each class period. The book knowledge obtained is then applied in the hands-on training portion of the class. Theory first, and actual application of the theory follows shortly thereafter.

C. PROGRAM EXPECTATIONS / COMPETENCIES/OBJECTIVES:

Upon completion of the Phlebotomy program, students will have an opportunity to learn how to:

- a. Demonstrate knowledge, entry-level skills, and tasks associated with blood collecting and other specimen collection processes.
- b. Assist the health care team in the accurate, safe, and reliable collection and transportation of specimens for clinical laboratory analyses.
- c. Apply knowledge to basic and special laboratory procedures.
- d. Demonstrate proper infection control techniques used in specimen collection.
- e. Select appropriate equipment, methods, and reagents for the collection of laboratory specimens.
- f. Prepare patients and equipment for the collection of laboratory specimens.
- g. Apply ethical, legal, and regulatory issues to the collection of laboratory specimens.
- h. Evaluate quality control procedures and possible sources of error or inconsistencies in specimen collection.
- i. Work cooperatively with staff members, patients, and community resource people.
- j. Apply knowledge to create and maintain a safe working environment.

- k. Respect patient confidentiality and maintain professional conduct in a culturally diverse environment.

TOPICS / UNITS

Program Titles	Lecture Hours	Lab Hours	Total Hours
Class 1- Introduction to Phlebotomy	4	0	4
Class 2- Lab Skills Development – First Blood Draws	0	4	4
Class 3- Specimen Collection and Order of the Draw	4	0	4
Class 4- Lab Skills Development- Dermal Sticks & Butterfly Needles	0	4	4
Class 5- Lab processing and PRP	4	0	4
Class 6- Lab Skills Development- Centrifuge and Dermal Sticks	0	4	4
Class 7- Infection Control and Anatomy	4	0	4
Class 8- Lab Skills Development – Hands on Practice/Activity	0	4	4
Class 9- Practical Exam	0	4	4
Class 10- National Exam	4	0	4
Total Hours			40

Procedures List:

Proper Handwashing Technique; Gowning, Masking, and Gloving; Removal of Isolation Gown, Mask, and Gloves; Disposing of Contaminated Items; Gloving Technique; The Basics of Patient Identification; Use of a Tourniquet; Performing a Venipuncture; Skin Puncture Using a Retractable Device; Heel stick Procedure; Dorsal Hand Vein Procedure; Surgicutt Bleeding Time Test; Syringe Blood Culture Collection; Safety Butterfly Assemble Blood Culture collection; Obtaining a Blood Specimen for Glucose Testing; Collecting a 24-Hour Urine Specimen; Proper Specimen Handling.

Program Competencies:

40 HOUR: Program Outline/Competencies

Program: Phlebotomy Training

The program is not graded, it is a pass/fail program. As the program progresses, the instructors determine through Assessments such as quizzes in each section and the hands-on skills of the students to determine if they are keeping up with the rest of the class. Remedial training is provided if it is found that a student is not progressing. Students are allowed to attend the weekend/evening/day classes free of charge for additional training. They can also attend month after month if they feel they need additional training. Students must pass 70% of modules to continue and stay on track for graduation.

Outline	Hours		Competencies	Assessment Grading System
	Didactic	Lab		
Class 1- Introduction to Phlebotomy	Total Hours 4	Total Hours		
Introduction and Classroom Operations	45 min		A. Paperwork, Classroom Rules, Introductions	Quiz
History of Phlebotomy Ethical Behavior Bedside Manner	30 min		A. Students will learn a brief history and introduction to Phlebotomy B. Their role and potential duties as a phlebotomist C. Introduced to the steps and procedures of a blood draw	Quiz

			<ul style="list-style-type: none"> D. Demonstrate knowledge of different types of patient consent E. Learn the importance of bedside manner and attitude 	
<p>Personal Protective Equipment</p> <p>Sharps Containers and Decontamination</p> <p>Exposure and Introduction to OSHA</p>	45 min		<ul style="list-style-type: none"> A. Demonstrate the importance of personal protective equipment B. Demonstrate the importance of proper procedure and technique of Sharps disposal C. Demonstrates knowledge of proper decontamination including equipment, tools, and surfaces D. Demonstrate proper procedure and risk of exposure including documentation protocols E. Knowledge of different areas of OSHA inspection 	Quiz
<p>Tourniquet/Counter Pressure</p> <p>Requisition Forms</p>	60 min		<ul style="list-style-type: none"> A. Demonstrate knowledge of proper tourniquet placement and application B. Demonstrate knowledge use of counter pressure in relation to a blood draw and tube change C. Learn and observe the differences between forms by facility 	Quiz
Medical Terminology Glossary	40 min		A. Medical Terminology	Visual
Class 2- Lab Skills Development- First Blood Draws	Total Hours	Total Hours		
		4		
Tourniquet tying / Vein palpation		25 min	A. The student will observe and practice tying the restricting band, and gain familiarization with palpation techniques	Demonstration Visual
Demonstration of "Vein Viewer"		20 min	A. The student will gain practical knowledge of advanced tool use in clinical settings	Visual

Counterpressure demonstration and Hands-On practice of counterpressure.		20 min	A. Students will gain practical skills in the use of counter pressure for phlebotomy and sample collection.	Practical
Demonstration of Blood Draw technique		30 min	A. Students will observe blood draw skills in practice, and participate in mock draws.	Visual Practical
Demonstration and first actual blood draw in pairs/teams		90 min	A. Students will participate in the practical application of blood draw, and straight needle use. Students will practice as many draws as time allows.	Practical
Class 3- Specimen Collection and Order of the Draw	Total Hours	Total Hours		
	4			
Capillary Punctures Hemostasis Venipuncture, Procedures, and Possible Problems	60 min		A. Learn proper procedures for capillary punctures B. Students learn the stages of the healing process C. Demonstrate knowledge of the proper procedure, potential problems, and correction D. Learn additional information to assist with difficult blood draws	Quiz
Assessment	45 min		A. Students will take and grade assessment	Quiz
Test Tubes, Additives, and the Order of the Draw	60 min		A. The student will learn basic test tubes, their additives, common tests, and the approved order of draw	Quiz
Assessment	40 min		B. Students will take and grade assessment	Quiz
Class 4- Lab Skills Development- Dermal Sticks & Butterfly Needles	Total Hours	Total Hours		
	4			
Lab - Straight Stick practice		65 min	A. Students continue to demonstrate and gain	Observation

			proficiency with the butterfly needle specific to hand veins, straight needle, and capillary puncture	
Lab - 5 Dermal Sticks		45 min	A. Students will practice and accomplish 5 dermal sticks with Lancets	Observation
Demonstration of “Butterfly” needles. Practice with “butterfly” and straight needles		90 min	A. Students will observe demonstrations of winged needle sets, and practice with winged needle sets, as well as continued practice with straight needle sets.	Observation
Class 5- Lab processing and PRP	Total Hours 4	Total Hours		
Video	20 min		A. Watch ABG (Arterial Blood Gas) Collection	Visual
Panels, Profiles, and Sections of the Clinical Lab Specimen handling and Procurement Other Bodily Fluid Collections, Lab Processing/Centrifuge and Blood Smear Variables in Specimen Quality and Hematocrit Testing	45 min		A. Learns and demonstrates knowledge of tests required, clinical procedures, and required placement in sections of the lab B. Learn and demonstrate specified procedures and their requirements C. Learn collection and handling techniques of stool, urine, and sputum D. Learn and demonstrate proper technique in centrifuge and blood smear E. Learn differences between specimen quality including but not limited to quantity not sufficient, inadequate inversion, icteric, lipemic, and hemolyzed F. Identify example of hematocrit test	Quiz
Other Specimen Collection	15 min		A. Stool and Urine Samples Video	Visual

Laboratory Processing	25 min		<ul style="list-style-type: none"> A. Learn and demonstrate proper techniques in centrifuge and blood smear B. Learn differences between specimen quality including but not limited to quantity not sufficient, inadequate inversion, icteric, lipemic, and hemolyzed 	Quiz
Assessment	20 min		<ul style="list-style-type: none"> A. Take and correct Assessment 	Quiz
Anatomy and Physiology Circulatory System Nervous System, Urinary System, and Integumentary System Blood Vessels, Components of Whole Blood Hemodialysis, AV Fistula, and Grafts	45 min		<ul style="list-style-type: none"> A. Students will learn functions of / anatomy in regards to the circulatory system, heart, and circulation B. The student will learn focused information for each system C. Students will learn the types of vessels, their layers and functions D. Students will learn the types of cells, functions, types of diseases associated with abnormalities E. Students will learn difference between serum and plasma F. Learn a brief study of blood acidity and blood typing G. Students will learn procedures associated with this condition and possible operations 	Quiz
Class 6- Lab Skills Development Centrifuge and Dermal Sticks	Total Hours	Total Hours 4		
Draw for Centrifuge / Centrifuge and Transfer of Sample		40 min	Students learn proper technique for specimen draw, centrifuge use	Observation
Dermal Sticks / Making Slides		40 min	The student learns to perform dermal sticks, and proper slide creation	Observation

Lab - Skills Practice		125 min	Students continue to demonstrate and gain proficiency with the “butterfly” needle specific to hand veins, straight needle, and capillary procedures.	Observation
Class 7- Infection Control and Anatomy	Total Hours 4	Total Hours		
Infection Control Bloodborne Pathogens Universal, Standard, Transmission Based Precautions	30 min		<ul style="list-style-type: none"> A. Student will learn modes of transmission, portals of entry, techniques and procedures to prevent transmission A. Student will learn various nosocomial infections and bloodborne pathogens, their risks, possible transmission, symptoms, and proper procedure to prevent/reduce transmission B. Student will learn prevention strategies, situational experience, and precautions necessary to protect themselves against blood and potentially infectious materials C. Student will learn various types of associated transmission based contagious diseases and the preventative measures needed for protection 	Quiz
Assessment	20 min		A. Take and correct Assessment	Quiz
Safety, OSHA, Fire Safety	30 min		<ul style="list-style-type: none"> A. Student will learn to identify Hazardous situations B. Student will learn to use the SDS manuals C. Student will learn the basics of fire Extinguisher use 	Quiz
Assessment	20 min		B. Take and correct Assessment	Quiz
Job Search and Interviewing	60 min		A. Students will learn resources, techniques, and additional skills	Oral

			necessary to further assist them B. Participation in mock interview and receive moderate assistance with resume	
Glossary and Study Guide	90 min		A. Student will learn necessary medical terms, abbreviations, prefixes and suffixes B. Student will complete study guide	Oral
Class 8- Lab Skills Development- Hands on Practice/Activity	Total Hours	Total Hours 4		
Lab (Reminder NO pass-offs, only practice)		95 min	A. Student continues to demonstrate and gain proficiency with the butterfly needle specific to hand veins, straight needle, and capillary puncture	Observation
Lab (Reminder NO pass-offs, only practice)		105 min	A. Student continues to demonstrate and gain proficiency with the butterfly needle specific to hand veins, straight needle, and capillary puncture	Observation
Class 9- Practical Exam	Total Hours	Total Hours 4		
Lab - Skills Examination		105 min	A. Practical Exam - Hands on Pass-Off (Two arm draws, two hand draws, completely unassisted)	Observation Practical Assessment
Lab - Skills Examination		95 min	B. Practical Exam - Hands on Pass-Off Continued (Students should continue to practice even if they have completed the Practical Exam)	Observation Practical Assessment
Class 10 – National Exam	Total Hours	Total Hours		

	4			
Test Review	40 min		A. Test Review	Written
National Examination	180 min		A. Student will be able to sit National Examination - Proctored	Written

Textbook

Phlebotomy Textbook
The Fundamental Guide to Phlebotomy: A competency-based approach. Edition
Number: First Edition (2022)
ISBN: 979-8-218-02579-3

Holder in Due Course Statement

Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds, hereof Recovery hereunder by the debtor shall not exceed amounts paid by the debtor. (FTC Rule effective 5-14-76).

Accreditation Status

Intelvio, LLC d/b/a Phlebotomy Training Specialists does not hold regional, national or programmatic accreditation from a U.S. Department of Education approved accreditor. The school does not participate in federal or state student aid programs.

PTS students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcareer Association (NHA), National Centers for Competency Testing (NCCT), and National Healthcare Certification Organization (NHCO)) and PTS training complies with the standards of all relevant phlebotomy trade associations.