



**PHLEBOTOMY**  
TRAINING SPECIALISTS

## **Wisconsin Course Catalog**

3333 N Mayfair Road, Suite 115,  
Wauwatosa, WI 53222

[www.PhlebotomyUSA.com](http://www.PhlebotomyUSA.com)

[Info@phlebotomyusa.com](mailto:Info@phlebotomyusa.com)

701-404-9434

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## **Wisconsin State Authorization**

Phlebotomy Training Specialists has been granted approval by the Wisconsin Department of Safety Professional Services, Educational Approval Program.

## **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 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 COO of PTS. Ms. Treu has broad experience at 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.

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 has served as a Managing Director at Unifund SA, 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, Edcetera 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

David Roberts is the Chief Financial Officer (hereinafter referred to as CFO). Mr. Roberts 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. Prior to 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.

## **School History**

Phlebotomy Training Specialists (hereinafter referred to as the School) offers phlebotomy training for students and is well 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 a practical and didactic learning. Students are able to leave the program feeling confident in their ability to enter the workforce as a phlebotomist. Since Phlebotomy Training Specialists inaugural class in 1993, the school has had over 87,000 graduates. Today Phlebotomy Training Specialist is one of the largest stand-alone phlebotomy training schools.

## **Mission and Objectives**

Phlebotomy Training Specialists' mission and objectives are to provide up-to-date, state-of-the-art, Phlebotomy Training to individuals interested in receiving this training. Phlebotomy Training Specialists' objective is to aim for high-quality, well-trained, competent Phlebotomists who can use their skills to benefit patients and employers.

## **Administration**

Brian Treu - CEO, Administrator  
Dina Said Dwyer- Acting Chair  
Alexis Treu - COO  
Dave Roberts - CFO  
Ericha Dick - Director of Training  
Adrienne Current - Book Keeper  
Monica Sanborn - State Licensing

## **Faculty Members & Qualifications**

<b>Pamela Thomas Garrett</b>	AM Instructor	MATC Certified Phlebotomist since 2008
<b>Kenyatta Lee</b>	PM & WKD Instructor	Certified Medical Assistant since 2009. Phlebotomist since 2016

## **Contact Information**

### **School Addresses:**

**Wauwatosa-** 3333 N Mayfair Road, Suite 115, Wauwatosa, WI 53222

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

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

Email: [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com)      Website: [www.phlebotomyusa.com](http://www.phlebotomyusa.com)

## **Programs/Courses Offered**

1 Certificate Program: 96 Hours- Phlebotomy Training

## **Program/Course Cost**

Tuition	Registration	Books/Supplies/Equipment	Total Tuition/Fee	National Exam
\$1445.00	\$100.00 (NON-REFUNDABLE AFTER 3 BUSINESS DAYS)	\$165.00	\$1710.00	\$115.00 (paid to a third party)

**Total for Phlebotomy Training Program & Exam = \$1825.00**

## **Payment Policy**

Tuition and fees for class can be paid by logging into your student account at [students.phlebotomyusa.com](https://students.phlebotomyusa.com). We accept all major credit cards. \$265 minimum is required at the time of registration. After the initial registration fee of \$265 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 [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). The Director will review all payment extensions. If an extension is approved, the student will remain in their scheduled course but will be required to pay in full before challenging the practical or national exam.
2. If a student does not contact the Director, 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. Phlebotomy Training Specialists do not offer financial aid or loans.

## **Financing Options**

Students may apply for financing with Monterey Financial via the student portal. Students may apply for financing at any point throughout the course, and they may choose any amount to finance (not to exceed their balance). Students may select terms in 12, 18, or 24 months at a rate of 18%. Should students withdraw from the course, the published refund policy would apply.

**Exam Information - Optional** – ALL National Exam fees must be paid before the National Exam testing date to guarantee a spot on the exam roster.

Any questions or concerns regarding these policies should be directed to

[info@phlebotomyusa.com](mailto:info@phlebotomyusa.com).

## **Book/Supplies & Equipment**

**Books/ Supplies & Equipment:** \$165.00 nonrefundable after being issued.

**Exam fee:** \$115 refundable if not taken.

## **Student Workbook**

Once textbooks are issued and received by students, these become the property of students and refunds may be made only at the discretion of the private school.

No refund is required for any student who withdraws or is dismissed after completing 60% of the potential units of instruction in the current enrollment period unless a student withdraws due to mitigating circumstances, which are those that directly prohibit the pursuit of a program and which are beyond the student's control.

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.

## **Class Schedule**

**Day:** 9am to 1:00pm - Monday- Thursday, 24 Classes

**Evening:** 6 pm to 10 pm – Monday- Thursday, 24 Classes

**Weekend:** 8 am – 4:30 pm w/ lunch break – 12 Saturdays

## **2023 Class Dates and Application Deadlines**

<b>Month / Class</b>	<b>Dates of each Class</b>	<b>Application Deadline</b>
<b>Jan / Feb Day</b>	11, 12, 13, 17, 18, 19, 20, 23, 24, 25, 26, 27, 30, 31, Feb 1, 2, 3, 6, 7, 8, 9, 10, 13, 14	Jan 4 <sup>th</sup>
<b>Jan / Feb Eve</b>	11, 12, 13, 17, 18, 19, 20, 23, 24, 25, 26, 27, 30, 31, Feb 1, 2, 3, 6, 7, 8, 9, 10, 13, 14	Jan 4 <sup>th</sup>
<b>Jan - Mar Weekend</b>	7, 14, 21, 28, Feb 4, 11, 18, 25, Mar 4, 11, 18, 25	Dec 30 <sup>th</sup>



<b>Feb / Mar Day</b>	16, 17, 21, 22, 23, 24, 27, 28, Mar 1, 2, 3, 6, 7, 8, 9, 10, 13, 14, 15, 16, 17, 20, 21, 22	Feb 9 <sup>th</sup>
<b>Feb / Mar Eve</b>	16, 17, 21, 22, 23, 24, 27, 28, Mar 1, 2, 3, 6, 7, 8, 9, 10, 13, 14, 15, 16, 17, 20, 21, 22	Feb 9 <sup>th</sup>
<b>Mar / Apr Day</b>	27, 28, 29, 30, 31, Apr 3, 4, 5, 6, 7, 10, 11, 12, 13, 14, 17, 18, 19, 20, 21, 24, 25, 26, 27	Mar 20 <sup>th</sup>
<b>Mar / Apr Eve</b>	27, 28, 29, 30, 31, Apr 3, 4, 5, 6, 7, 10, 11, 12, 13, 14, 17, 18, 19, 20, 21, 24, 25, 26, 27	Mar 20 <sup>th</sup>
<b>Apr – June Weekend</b>	1, 2*, 8, 15, 22, 29, May 6, 13, 20, June 3, 10, 17	Mar 25 <sup>th</sup>
<b>May - June Day</b>	1, 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22, 23, 24, 25, 30, 31, Jun 1, 2, 5	Apr 24 <sup>th</sup>
<b>May - June Eve</b>	1, 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22, 23, 24, 25, 30, 31, Jun 1, 2, 5	Apr 24 <sup>th</sup>
<b>June - July Day</b>	7, 8, 9, 12, 13, 14, 15, 16, 20, 21, 22, 23, 26, 27, 28, 29, 30, Jul 5, 6, 7, 10, 11, 12, 13	May 31 <sup>st</sup>
<b>June – July Eve</b>	7, 8, 9, 12, 13, 14, 15, 16, 20, 21, 22, 23, 26, 27, 28, 29, 30, Jul 5, 6, 7, 10, 11, 12, 13	May 31 <sup>st</sup>
<b>July - Sep Weekend</b>	8, 15, 22, 29, Aug 5, 12, 19, 26, Sep 9, 16	June 30 <sup>th</sup>
<b>July / Aug Day</b>	18, 19, 20, 21, 24, 25, 26, 27, 28, 31, Aug 1, 2, 3, 4, 7, 8, 9, 10, 11, 14, 15, 16, 17, 18	July 11 <sup>th</sup>
<b>July / Aug Eve</b>	18, 19, 20, 21, 24, 25, 26, 27, 28, 31, Aug 1, 2, 3, 4, 7, 8, 9, 10, 11, 14, 15, 16, 17, 18	July 11 <sup>th</sup>
<b>Aug / Sep Day</b>	23, 24, 25, 28, 29, 30, 31, Sep 5, 6, 7, 8, 11, 12, 13, 14, 15, 18, 19, 20, 21, 22, 25, 26, 27	Aug 16 <sup>th</sup>
<b>Aug / Sep Eve</b>	23, 24, 25, 28, 29, 30, 31, Sep 5, 6, 7, 8, 11, 12, 13, 14, 15, 18, 19, 20, 21, 22, 25, 26, 27	Aug 16 <sup>th</sup>
<b>Sep / Dec Weekend</b>	30, Oct 1*, 7, 14, 21, 28, Nov 4, 11, 18, Dec 2, 9, 16	Sep 23 <sup>rd</sup>
<b>Oct / Nov Day</b>	4, 5, 6, 10, 11, 12, 13, 16, 17, 18, 19, 20, 23, 24, 25, 26, 27, 30, Nov 1, 2, 3, 6, 7, 8,	Sept 27 <sup>th</sup>

<b>Oct / Nov Eve</b>	4, 5, 6, 10, 11, 12, 13, 16, 17, 18, 19, 20, 23, 24, 25, 26, 27, 30, Nov 1, 2, 3, 6, 7, 8	Sept 27 <sup>th</sup>
<b>Nov / Dec Day</b>	13, 14, 15, 16, 17, 20, 21, 27, 28, 29, 30, Dec 1, 4, 5, 6, 7, 8, 11, 12, 13, 14, 15, 18, 19	Nov 6 <sup>th</sup>
<b>Nov / Dec Eve</b>	13, 14, 15, 16, 17, 20, 21, 27, 28, 29, 30, Dec 1, 4, 5, 6, 7, 8, 11, 12, 13, 14, 15, 18, 19	Nov 6 <sup>th</sup>

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. Anyone can take this class but it is required that students who enroll in the program possess a minimum of a high school diploma, General Education Development (GED) Certificate, and must be 18 years of age to enroll. Students may be allowed to enroll without meeting this requirement, but will be pre-screened by the management of the company to ensure they have the capacity to complete the program.

We do not require students to have previous medical experience or knowledge. Immunizations are not required to take the course. 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](http://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.

## **Disability Accommodations Policy**

Phlebotomy Training Specialists (PTS) believe in providing access to a diverse population. PTS complies with state and federal disability laws and makes reasonable accommodations for applicants and students with disabilities. Post-secondary schools have no obligation to identify students with disabilities. If you need accommodation, it is your responsibility to make your disability known to the school and request any needed accommodation. PTS will make reasonable accommodations for applicants and students unless doing so would result in a fundamental alteration of the program or would result in an undue burden. You must also be able to show the relationship between the disability and the need for accommodation.

For information and questions about our Student Accessibility Services (SAS) support, policies, and process, please contact Student Services at 701-404-9434 or [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com).

## **Enrollment / Admission**

Prospective students will need to enroll by the application deadline. The application deadline is the day before the class starts. The application can be accessed on our website at [www.PhlebotomyUSA.com](http://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 course 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, whether at the request of the school or the student, requires a written agreement signed by the student and the school. The agreement must set forth:

- a. Whether the postponement is for the convenience of the school or the student, and;
- b. A deadline for the new start date, beyond which the start date will not be postponed.

If the course 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 an appropriate refund of prepaid tuition and fees within 30 days of the deadline of the new start date set forth in the agreement, determined in accordance with the school's refund policy and all applicable laws and rules concerning the Private Occupational Education Act of 1981.

## **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 in finding 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 your ability to pass. This course is comprised of 24 four-hour modules. In order to complete the class and receive a certificate of completion, students must attend at least 21 out of 24 modules. If students miss more than 3 modules throughout the class, they will be required to make up the modules they missed in an alternate schedule. If students miss four *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 23 are required to complete the course, as these modules contain foundational information (1 & 2) and the practical exam (23).

## **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](mailto: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 course due to non-payment of tuition and fees by the half-way 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)**

Phlebotomy Training Specialists do not have any standard leave of 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. If a student fails to return from any Leave of Absence, the student will be considered withdrawn. The withdrawal date is the date that the student was scheduled to return from Leave and failed to do so. Dismissal and refund policy will apply as relevant.

## **Progress Policy**

Students must maintain an 70% grade point average. Those who do not will be placed on probation for 30 days. During the probation period, students must raise their grade average to passing or higher. The student may be terminated if grades

are not satisfactory at the end of the probationary period. Termination shall be at the school Director's discretion. The Director has final authority and shall notify the student of the final decision.

## **Graduation Requirements**

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.

To practice as a licensed phlebotomist, the student must pass the course and pass the national exam. The testing entity is the NHCO, and an authorized proctor administers the exam. The NHCO can be contacted at 866-856-6082.

## **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. After consulting with the chief administrator, it is determined that if the student cannot complete the remediation required and the student will not benefit from the course, the student will be dismissed and the published refund will be applied.

## **Grading System**

<b>Class / Module 1</b>	<b>Past, Present and the Healthcare Setting</b>	<b>Pass / Fail</b>
<b>Class / Module 2</b>	<b>Quality Assurance and Legal Issues in Healthcare</b>	<b>Pass / Fail</b>
<b>Class / Module 3</b>	<b>Infection, Control, Safety, First Aid, and Personal Care</b>	<b>Pass / Fail</b>
<b>Class / Module 4</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 5</b>	<b>Medical Terminology</b>	<b>Pass / Fail</b>
<b>Class / Module 6</b>	<b>General Anatomy &amp; Physiology</b>	<b>Pass / Fail</b>
<b>Class / Module 7</b>	<b>Circulatory System Focused Anatomy &amp; Physiology</b>	<b>Pass / Fail</b>
<b>Class / Module 8</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>

<b>Class / Module 9</b>	<b>Blood Collection Equipment</b>	<b>Pass / Fail</b>
<b>Class / Module 10</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 11</b>	<b>Venipuncture Procedures</b>	<b>Pass / Fail</b>
<b>Class / Module 12</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 13</b>	<b>Pre-examination &amp; Preanalytical Considerations</b>	<b>Pass / Fail</b>
<b>Class / Module 14</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 15</b>	<b>Capillary Puncture Equipment, Principles and Procedures</b>	<b>Pass / Fail</b>
<b>Class / Module 16</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 17</b>	<b>Special Collections and Point of Care Testing</b>	<b>Pass / Fail</b>
<b>Class / Module 18</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 19</b>	<b>Career Development</b>	<b>Pass / Fail</b>
<b>Class / Module 20</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 21</b>	<b>Lab Day- Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 22</b>	<b>Urine &amp; Non-Blood Specimen Testing and Review</b>	<b>Pass / Fail</b>
<b>Class / Module 23</b>	<b>Lab Day- Practicum Exam and Skills Development</b>	<b>Pass / Fail</b>
<b>Class / Module 24</b>	<b>Review and Exam</b>	<b>Pass / Fail</b>

Remedial training will be given until a student passes each module of the course. Throughout your four-week class with Phlebotomy Training Specialists, your instructor will let you know exactly where you stand based on your interim progress reports.

## **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](http://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](mailto: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 not required, only suggested. Casual attire will suffice. Closed-toed

shoes are mandatory, no sandals, or open-toed shoes.

## **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.

5. **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 PTS’ founder, Brian Treu, and discussing with him on an individual basis, our expected classroom etiquette.

**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.

Permanent Termination from the program negates that student from re-admission to the program forever.

## **Facilities and Equipment**

Our schools are located at:

**Wauwatosa-** 3333 N Mayfair Road, Suite 115, Wauwatosa, WI 53222

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-lighted, 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 Course 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 96 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 course, each student will be required to satisfactorily perform the tasks correlated to the function in which they are training. Written testing is also required. One watch and critique test will be given. If the entire course is completed satisfactorily, a certificate of training will be awarded to the student at the completion of the class.

Students that complete the 96-hour certification course are eligible for employment within the state of Wisconsin. Those attending the certification course will be eligible for employment in all states\* assuming they pass the national exam. \*States such as California, Louisiana, Nevada, and Washington have additional licensing requirements.

## **Previous Credits / Transfer of Credits**

Phlebotomy Training Specialists is a special-purpose institution. Credits from another institution will be evaluated on a case-by-case basis. Phlebotomy Training

Specialists does not guarantee transferability of our credits to another institution unless there is a written agreement with another institution. Transferability of credits is at the discretion of the accepting institution; it is the student's responsibility to confirm whether credits will be accepted by another institution.

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

## **Student Grievance Procedure**

The institution is dedicated to the fair treatment of and professional conduct with students. Should a student have a complaint with Phlebotomy Training Specialists, then the student shall take the following steps.

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 Chief Operations Officer Alexis Treu, who will assist you in resolving your concerns. This process involves three steps:
  - i. An effort to define the problem
  - ii. An effort to identify acceptable options for a resolution; and
  - iii. An attempt to resolve the conflict through the application of one or more of these options

Please submit the written request within **60 days** of the occurrence to the COO, Alexis Treu [alexis@phlebotomyusa.com](mailto:alexis@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](mailto: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. The student may also file a written complaint with the State of Wisconsin Department of Safety and Professional Services, the Educational Approval Program (EAP) using the Student Complaint Form found here- <https://dsps.wi.gov/Pages/Programs/EducationalApproval/EAPFileAComplaint.aspx>. The State of Wisconsin Department of Safety and Professional Services is located at 4822 Madison Yards Way Madison, WI 53705. Their phone number is 608-266-2112 or 877-617-1565; <https://dsps.wi.gov/pages/Home.aspx>

Complaints must be filed within one year after the student's last recorded date of attendance.

## **Cancellation Policy**

*Three-Day Cancellation: Wis. Admin. Code s. SPS 406.03*

You may cancel this transaction, without any penalty or obligation, within three business days from the above date (Saturdays, Sundays, and holidays are not business days).

If you cancel, any property traded in, any payments made by you under the contract or sale, and any negotiable instruments executed by you will be returned within 10 business days following receipt by the seller of your cancellation notice, and any security interest arising out of the transaction will be canceled.

Purchase of educational goods and services offered by a school is deemed to take place when written and final acceptance is communicated to the student by the school. If the representative who enrolls you is authorized to grant written acceptance at the time you enroll and does so, the cancellation period ends at the time specified above. If you have not been accepted in writing at the time you enroll, the cancellation period does not end until midnight of the third business day after the day you receive written acceptance by certified mail from the school.

Please complete the Student's Right to Cancel Form and email it to [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com).

## **Refund Policy**

A student who withdraws or is dismissed after the period of time under Wis. Admin. Code s. SPS 406.03, three-day cancellation has passed, but before completing 60% of the potential units of instruction in the current enrollment period, shall be entitled to a pro-rata refund, as calculated below, less any amounts owed by the student of the current enrollment period, less the application fee of \$100.

1. Pro-rata refund shall be determined as the number of units remaining after

the last unit completed by the student, divided by the total number of units in the enrollment period, rounded downward to the nearest ten percent. A Pro-rata refund is the resulting present applied to the total tuition and other required costs paid by the student for the current enrollment period.

2. All efforts will be made to refund the prepaid amounts for books, supplies, and other charges, unless the student has consumed or used those items and they can no longer be used or sold to new students or returned by the school to the supplier.
3. Refunds shall be paid within 40 days after the effective date of termination
4. After the student's first period of enrollment, if a student withdrawal or is dismissed in a subsequent enrollment period, the school may retain an administrative fee of 15% of the total cost of a resident program, or \$400, whichever is less.
5. No refund is required for any student who withdraws or is dismissed after completing 60% of the potential units of instruction in the current enrollment period unless a student withdraws due to mitigating circumstances, which are those that directly prohibit the pursuit of a program and which are beyond the student's control.

## **Self-Evaluation Process**

Phlebotomy Training Specialists govern itself through annual meetings with an Advisory Committee of select professionals in the field from all over the United States. During these annual meetings, everything content-related is discussed; curriculum, procedures, safety, equipment, etc.

## **2023 PHLEBOTOMY TRAINING SYLLABUS**

### **A. COURSE DESCRIPTION:**

The Phlebotomy course is designed to train individuals to properly collect and process blood and other clinical specimens for laboratory testing and to interact with health care 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. This course will prepare individuals to write the Phlebotomist Certification examination.

### **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. COURSE EXPECTATIONS / COMPETENCIES/OBJECTIVES:**

Upon completion of the Phlebotomy course, 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**

<b><u>Course Titles &amp; Descriptions</u></b>	<b><u>Classroom Hours</u></b>	<b><u>Lab Hours</u></b>	<b><u>Total Hours</u></b>
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Day One Past, Present and the Healthcare Setting	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Two Quality Assurance and Legal Issues in Healthcare	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Three Infection Control, Safety, First Aid and Personal Care	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Four Lab Day – Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Five Medical Terminology	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Six Venipuncture Procedures	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Seven Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Eight General Anatomy & Physiology	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Nine Circulatory System Focused Anatomy & Physiology	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Ten Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Eleven Blood Collection Equipment	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Twelve Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Thirteen Pre-examination / Preanalytical Considerations	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Fourteen Lab-Day – Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Fifteen Capillary Puncture Equipment, Principles, and Procedures	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>

Day Sixteen Lab-Day Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Seventeen Special Collections and Point of Care Testing	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Eighteen Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Nineteen Career Development	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Twenty Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Twenty-One Lab Day- Skills Development	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Twenty-Two Urine & Non-Blood Specimen Testing	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Day Twenty-Three Lab Day- Practicum Exam	<b>0.0</b>	<b>4.0</b>	<b>4.0</b>
Day Twenty-Four Proctored Written Exam	<b>4.0</b>	<b>0.0</b>	<b>4.0</b>
Total			<b>96 Hrs</b>

### **COURSE DESCRIPTION**



Day One Past, Present, and the Healthcare Setting	This class will introduce the history of Phlebotomy and move into current offerings and practices of Phlebotomy. The modern- day health care setting will be investigated to make the student aware of what is expected of them in the workplace.
Day Two Quality Assurance and Legal Issues in Healthcare	This class focuses on the Quality aspects of accuracy, and the Legal and Ethical aspects of working as a healthcare provider.
Day Three Infection Control, Safety, First Aid and Personal Care	This class is dedicated to safety, the OSHA requirements, and infection control measures to keep students, providers, and patients safe in the clinical setting.
Day Four Lab Day – Skills Development	Video learning is used to introduce the new medical student to venipuncture. Students will familiarize themselves with the equipment used and will gain a practical knowledge of equipment used, in a noninvasive practical session.
Day Five Medical Terminology	This class is focused on introducing the students to medical terminology as it relates to Phlebotomy. Learning resources and techniques will be offered to the students to assist in learning this subject.
Day Six Venipuncture Procedures	Venipuncture procedures learned from the textbook, in preparation for hands-on experiences, and some preparatory skills and introduced. Special Populations and considerations are studied. Vein Viewer assist tool is introduced during a live stick example
Day Seven Lab Day – Skills Development	Students will watch and learn from an instructor lead demonstration of correct blood draw, and then practice live sticks on one another with provided equipment. Proper safety and wellness protocols will be strictly followed.
Day Eight General Anatomy & Physiology	This class is dedicated to students learning general body anatomy and physiology. The entire class period is dedicated to this subject.

Day Nine Circulatory System Focused Anatomy & Physiology	This class will teach the student a deeper understanding of the circulatory system, and all of the components of that system anatomy and physiology.
Day Ten Lab Day – Skills Development	Students will watch and learn from an instructor lead demonstration of correct blood draw, and then practice live sticks on one another with provided equipment. Proper safety and wellness protocols will be strictly followed
Day Eleven Blood Collection Equipment	. General Blood collection equipment is studied, Vein Viewer demonstration is performed. Vacuum Tube additives are learned, and the proper order of the draw is learned, mnemonics are introduced to assist students in memorization of the order of the draw.
Day Twelve Lab Day – Skills Development	Students will watch and learn from an instructor lead demonstration of correct blood draw, and then practice live sticks on one another with provided equipment. Proper safety and wellness protocols will be strictly followed.
Day Thirteen Pre-examination / Preanalytical Considerations	This class is designed to teach the student about complications and special handling of situations that will eventually be encountered in the Phlebotomy field.
Day Fourteen Lab Day – Skills Development	Students will watch and learn from an instructor lead demonstration of correct blood draw, and then practice live sticks on one another with provided equipment. Proper safety and wellness protocols will be strictly followed.
Day Fifteen Capillary Puncture Equipment, Principles, and Procedures	This class is dedicated to specimen collection from dermal puncture. Students will learn and practice the dermal puncture after the lecture and continue with dermal puncture specimen processing, create blood smear slides, and examine slides with a microscope provided in the classroom.

Day Sixteen Lab Day – Skills Development	This class is designed to allow the student to perform the sample collections, and process the samples with equipment that is most popular in the healthcare setting they will encounter as an entry-level Phlebotomy Technician.
Day Seventeen Special Collections and Point Of Care Testing	This class is dedicated to specimen handling for lab testing. This class will also look closely at Point of Care Testing machinery and processes that the new Phlebotomy Technician may encounter in the healthcare job market.
Day Eighteen Lab Day – Skills Development	This class is designed for open lab time. The students will practice ALL learned skills in preparation for the practicum testing at the end of this course. The practice sessions will be held with the same emphasis on skills as the practical skills sign-offs will be monitored
Day Nineteen Career Development	This class is designed to show students the correct methods and mannerisms regarding job applications, resume writing, and interviewing for entry-level healthcare employment.
Day Twenty Skills Development	This class is designed for open lab time. The students will practice ALL learned skills in preparation for the practicum testing at the end of this course. The practice sessions will be held with the same emphasis on skills as the practical skills sign-offs will be monitored.
Day Twenty-One Lab Day – Skills Development	This class is designed to have the students recruit and bring in friends and family to practice acquired skills, this opens the lab setting too many other body types and experiences.
Day Twenty-Two Urine & Non-Blood Specimen Testing	This class is designed to teach the students other specimen collections performed by Phlebotomy technicians for lab work. This class will also cover the lab procedures performed on the collected samples, transport, and storage of samples.

Day Twenty-Three Practicum Exam	This class will test the practical skills of the students. The practical skills sign-off will cover all of the hands-on skills learned during the course. After the students have completed the practical skills sign-off, they are welcome to continue practicing skills learned.
Day Twenty-Four Proctored Written Exam	This class begins with test preparation and review. This class will conclude with the students taking a proctored written examination for a national certifying body

### **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; Heelstick 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.

### **Textbook & Other Learning Resources**

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

The learning resource library is available from the student account and can be accessed at anytime from anywhere, and better yet, does not require multiple people to handle the learning resource like a hard copy book library, requiring decontamination between readers.

With the resources available in an electronic format, the same resource is available to all students, and no one is left waiting for a return of the resource, nor waiting until the next classroom visit to use the resource.

### **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.

Intelvio, LLC d/b/a Phlebotomy Training Specialists, Students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcareer Certification Organization) and the school's training complies with the Standards of all relevant phlebotomy trade associations (Clinical Laboratory Standards Institute, National Association of Phlebotomy Technicians, National Phlebotomy Certification Association).