

PHLEBOTOMY (ADULT*) TRAINING FOR RESEARCH STUDY TEAM MEMBERS

Phlebotomy is the practice of drawing blood from an individual. Research Study Team Members whose role includes performing phlebotomy (in adults*) at the University of Rochester must follow New York State (NYS) regulations. NYS does not require certification for phlebotomy, but NYS does require 6-month observation and annual training with assessment of competency. To meet NYS requirements, coordinators may utilize in-house resources:

- UR Medicine Lab's Phlebotomy Orientation Training Program
- Nursing Practice Phlebotomy Annual Update Course in MyPath
- In-House Trained Assessors

If a study's sponsor requires a certified phlebotomist, that individual will need to contact an external agency to obtain training to become a Certified Phlebotomy Technician (CPT). Examples of such agencies include: 1) Bryant and Stratton College and 2) the Board of Cooperative Educational Services (BOCES).

Questions can be addressed to: **Sue McAnany, Phlebotomy Education Coordinator:** 585-276-8261; 585-220-3775; UR Medicine Labs, Box 608, 211 Bailey Road Section C140.

*Pediatric phlebotomy training is not currently available for research study team members; however annual competency assessment is available.

Phlebotomy Orientation Training Program:

This in-person program is designed to orient the study team member to standardized phlebotomy techniques and best practices and to apply knowledge through a structured practicum which, when successfully completed, will result in the study team member's readiness for performing phlebotomy at the University of Rochester and its affiliates.

Fee \$745 subject to change: Payment must be received by Phlebotomy Education Coordinator prior to start of program. The study team member should contact their administrator for processing payment.

The program includes:

1. Class Instruction: 8 hours (during the day, no prerequisites required) held at AAB Cardiovascular Research 211 Bailey Road, West Henrietta NY 14580.
2. Practicum class is held at 400 Red Creek Drive, Henrietta NY: 2-3 days one-on-one training with assigned phlebotomist. The study team member must perform 50 successful adult venipunctures under the observance of a UR Medicine Lab phlebotomy trainer who will evaluate to the study team member's competency. The practicum location, a local patient service center, will be assigned by the Phlebotomy Education Coordinator. A *Phlebotomy Procedural Checklist* will be used to document practicum venipunctures activities; and

3. Upon successful completion of the orientation training program, the study team member's principal investigator, hiring manager or supervisor, whomever requested the training, will be provided an internal *Statement of Completion* which documents the practicum hours and details of observed venipunctures, as well as a *Phlebotomy Procedural Checklist* template for a 6-month post-phlebotomy orientation training competency assessment (see *Maintenance* section of this document).

To request study team member placement in the Phlebotomy Orientation

Training class: The potential study team member's principal investigator, hiring manager or supervisor, must email the Phlebotomy Education Coordinator, Sue McAnany at Susan_McAnany@URMC.Rochester.edu and include the study team member's name, department, UR box number, University email and phone number. Training classes are routinely held in groups of 6 to 10.

Maintenance: To maintain status as a phlebotomist, maintenance activities are required per NYS Department of Health regulations. It is the responsibility of the phlebotomist to meet maintenance requirements.

1. **6-Month Post-Phlebotomy-Orientation Training Competency Assessment:** Newly trained phlebotomists, at 6-months post-orientation training, must demonstrate their phlebotomy skill as witnessed and documented by a trained assessor. A trained assessor is an individual who has received phlebotomy training and is in an active training role (documented) to observe pre- and post-collection techniques. The Clinical Research Center's Nurse Manager (585-275-2907) is available to schedule a for-fee competency assessment observation. Observation off-site by the Clinical Research Center assessor is possible upon request and subject to the assessor's availability; travel costs may also apply.
 - a) *Phlebotomy Procedural Checklist(s)*, completed by the trained assessor, will be used to document the phlebotomist's competency of a successful venipuncture. It is the responsibility of the phlebotomist to identify a trained assessor and complete this assessment.
2. **Annual Training:** Maintenance of phlebotomy training must be performed annually. Both nurse and non-nurse phlebotomists must:
 - a) Take the annual refresher course in [MyPath](#), entitled *Nursing Practice Phlebotomy Annual Specimen Collection Review*; and
 - b) Demonstrate to a trained assessor, competency of a successful venipuncture from a patient or research subject. Available from MyPath course, the *Phlebotomy Procedural Checklist(s)*, completed by the trained assessor, will be used to document the phlebotomist's competency. It is the responsibility of the phlebotomist to identify a trained assessor and complete this assessment. The Clinical Research Center's Nurse Manager (585-275-2907) is available to schedule an observation for a minimal fee. Observation off-site by the Clinical Research Center assessor is possible upon request and subject to the assessor's availability; travel costs may also apply. For pediatric phlebotomy competency

- assessment, contact the Pediatric Clinical Resource Nurse (585-406-4415) or Pediatric Vascular Access Nurse (585-276-6659); and
- c) After successful demonstration of skill, the phlebotomist must complete the *Phlebotomy Attestation of Skill Demonstration* within MyPath.

Accessing the Annual Course and Completing Competency Assessment:

- 1) Log into MyPath: <http://mypath.rochester.edu/>.
- 2) Search for and launch the course: *Nursing Practice Phlebotomy Annual Specimen Collection Review*.
- 3) Review course and materials.
- 4) Complete course and review questions.
- 5) Within course, download and print the *Phlebotomy Procedural Checklist* for later use for demonstration of competency.
- 6) After demonstration of competency, log into the course, and complete the *Phlebotomy Attestation of Skill*.
- 7) Using the procedural checklist, demonstrate to a trained assessor the phlebotomy skill by performing a successful venipuncture and draft the attestation form.
- 8) Log into MyPath and complete the *Phlebotomy Attestation of Skill Demonstration* course section.
- 9) Course completion will show in the phlebotomist's MyPath under learning transcript as "completed".

It is the phlebotomist's responsibility to:

- Maintain training and competency documentation records. These documents are not stored in the phlebotomist's MyPath course or with the Phlebotomy Training Coordinator.
- Be up-to-date with the University's mandatory training for blood borne pathogens, standard precautions, and use of personal protection equipment.

References:

- 1) New York State Department of Health, Regulatory Programs, [Clinical Laboratory Evaluation Program](#), Survey Standards, Current Standards
<http://www.wadsworth.org/regulatory/clep/clinical-labs/obtain-permit/on-site-survey/laboratory-standards>
Part 1 General Systems Standards -Effective January 1, 2017
https://www.wadsworth.org/sites/default/files/WebDoc/NYSDOH_Standards_Part_1_General_Systems_01012017.pdf
Human Resources Sustaining Standard of Practice 6 (HR S6): Training
 - i. Human Resources Sustaining Standard of Practice 9 (HR S9):
Competency Assessment – Non-technical Staff
- 2) CLSI. *Procedures for the Collection of Diagnostic Blood Specimens by Venipuncture; Approved Standard-Sixth Edition*. CLSI document GP41-A6. Wayne, PA: Clinical and Laboratory Standards Institute; 2007.

- 3) CLSI. *Procedures for the Handling and Processing of Blood Specimens for Common Laboratory Tests; Approved Guideline-Fourth Edition*. CLSI document GP44-A5. Wayne, PA: Clinical and Laboratory Standards Institute; 2010.
- 4) College of American Pathologists. Laboratory General Checklist. Northfield, IL: College of American Pathologists; 2015. www.cap.org.
- 5) The Joint Commission. National Patient Safety Goals. NPSG.01.01.01: Use at least two patient identifiers when providing care, treatment and services. The Joint Commission; 2017. <https://e-dition.jcrinc.com/MainContent.aspx>.