



PHLEBOTOMY
TRAINING SPECIALISTS

Oklahoma Course Catalog

3535 NW 58th Street, Suite 100,
Oklahoma City, OK 73112

5801 E 41st Street, Suite 104,
Tulsa, OK 74135

www.PhlebotomyUSA.com

701-404-9434

Volume No. 6 January 2023

Table of Contents

<i>Introduction</i>	4
<i>School History</i>	5
<i>Mission and Objectives</i>	5
<i>Administration</i>	6
<i>Faculty</i>	6
<i>Contact Information</i>	6
<i>Course Offered</i>	6
<i>Course Cost</i>	7
<i>Payment Policy</i>	7
<i>Financing Options</i>	7
<i>Student Loans</i>	8
<i>Supplies & Equipment</i>	8
<i>Class Schedule</i>	8
<i>2024 Class Dates and Application Deadlines</i>	8
<i>Entrance Requirements</i>	10
<i>Admission Application and Deadline</i>	11
<i>Postponement of Start Date</i>	11
<i>Employment Advisory Services</i>	12
<i>Attendance Requirements</i>	12
<i>Make-up Time</i>	13
<i>Rescheduling/Readmittance</i>	13
<i>Scheduled Absence(s)</i>	13
<i>Progress Policy</i>	13
<i>Grading System</i>	14
<i>Graduation and Certificate of Training Requirements</i>	14
<i>Student Performance, Remediation, and Academic Dismissal Policy</i>	15
<i>Optional National Certificate Requirements</i>	16
<i>Leave of Absence</i>	16
<i>Dress Code</i>	16
<i>Records</i>	16

<i>Conduct & Dismissal Policy</i>	16
<i>Warnings & Suspension</i>	18
<i>Re-entry / Readmission</i>	18
<i>Student Probation</i>	19
<i>Voluntary Withdrawal From Class</i>	19
<i>Student Rights</i>	19
<i>Facilities and Equipment</i>	19
<i>Exam and Learning Resource Information</i>	20
<i>Educational Services</i>	20
<i>Previous Credits</i>	21
<i>Transfer of Credits & State to State Transfer</i>	21
<i>Student Grievance Procedure</i>	21
<i>Cancellation and Refund Policy</i>	23
<i>Tuition Refund Policy and Table</i>	24
<i>Student Eligibility, Accommodations, and Performance Policy</i>	24
2024 PHLEBOTOMY TRAINING SYLLABUS	25
TOPICS/UNIT	26
<i>Procedures List:</i>	27
<i>Textbook</i>	28
<i>Holder in Due Course Statement</i>	28
<i>Accreditation Status</i>	28

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
Monica Sanborn - State Licensing Administrator
Heidi Samani- Director of Student Services
Ericha Dick- Directors of Training

Faculty

Oklahoma City

- Megan Rawlings, Campus Director, Instructor, AM/PM
- Kelli Thrasher, Instructor, WKD

Tulsa

- Louis J. Bowie III, Campus Director, Instructor, AM/PM
- Ashley Freeman, Instructor, WKD
- Audrey Alvarado, Instructor, PM

Contact Information

School Addresses:

Oklahoma City- 3535 NW 58th Street, Suite 100, Oklahoma City, OK 73112

Tulsa- 5801 E 41st Street, Suite 104, Tulsa, OK 74135

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

Course Offered

1 Certificate Program: Phlebotomy Technician Training & Certification

Course Length: 48 Hour

Course Cost

<u>Tuition</u>	<u>Registration</u>	<u>Books/Supplies/Equipment</u>	<u>Total Tuition/Fee</u>	<u>National Exam</u>
\$450.00	\$85.00 (NON-REFUNDABLE AFTER 3 BUSINESS DAYS)	\$145.00	\$680.00	\$115.00 (paid to a third party)

Total for Phlebotomy Training Program & Exam = \$795.00

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. \$85 minimum is required at the time of registration. After the initial registration fee of \$85 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 course 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 course,

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 course, 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: \$110.00 – 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 (12 Classes)

Day: 9am to 1:00pm – Monday – Thursday (12 Classes)

Weekend: 8 am – 4:30 pm Saturdays (6 Classes)

2024 Class Dates and Application Deadlines

Month/Class	Dates of each Class	Application Deadline
Jan Day	8, 9, 10, 11, 16, 17, 18, 22, 23, 24, 25, 29	Dec 30 th
Jan Eve	8, 9, 10, 11, 16, 17, 18, 22, 23, 24, 25, 29	Dec 30 th
Jan / Feb Weekend	13, 20, 27, February 3, 10, 17	Dec 30 th
Feb Day	5, 6, 7, 8, 12, 13, 14, 15, 20, 21, 22, 26	Jan 29 th

Feb Eve	5, 6, 7, 8, 12, 13, 14, 15, 20, 21, 22, 26	Jan 29 th
Mar Weekend	2, 9, 16, 23, 30, April 6	Feb 26 th
Mar Day	4, 5, 6, 7, 11, 12, 13, 14, 18, 19, 20, 21	Feb 26 th
Mar Eve	4, 5, 6, 7, 11, 12, 13, 14, 18, 19, 20, 21	Feb 26 th
April Day	1, 2, 3, 4, 8, 9, 10, 11, 15, 16, 17, 18	March 25 th
Apr Eve	1, 2, 3, 4, 8, 9, 10, 11, 15, 16, 17, 18	March 27 th
Apr / May Weekend	20, 27, May 4, 11, 18, June 1	Apr 15 th
May Day	April 29, 30, May 1, 2, 6, 7, 8, 9, 13, 14, 15, 16	Apr 22 nd
May Eve	April 29, 30, May 1, 2, 6, 7, 8, 9, 13, 14, 15, 16	Apr 22 nd
June Day	3, 4, 5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 23 rd
June Eve	3, 4, 5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 23 rd
June / July Weekend	15, 22, 29, July 6, 13, 20	June 10 th
July Day	8, 9, 10, 11, 15, 16, 17, 18, 22, 23, 24, 25	June 28 th
July Eve	8, 9, 10, 11, 15, 16, 17, 18, 22, 23, 24, 25	June 28 th
Aug Weekend	3, 10, 17, 24, Sept 7, 14	July 29 th
Aug Day	5, 6, 7, 8, 12, 13, 14, 15, 19, 20, 21, 22	July 29 th
Aug Eve	5, 6, 7, 8, 12, 13, 14, 15, 19, 20, 21, 22	July 29 th

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

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.

Students are required to have a high school diploma or GED as a minimum entry requirement into the program. If this proof of education was issued outside of the United States, students must have their documents evaluated for equivalency by a recognized provider such as naces.org, scholar.com, or wes.org. Some employers may also require proof for employment and it will be the student's responsibility to comply with employer requirements. We also require students to be beyond the age of compulsory high school attendance.

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 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. 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 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 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 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 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 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 12 four-hour modules. To complete the class and receive a certificate of completion, students must attend at least 10 out of 12 modules. If students miss more than 2

modules 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 11 are required to complete the course, as these modules contain foundational information (1 & 2) and the practical exam (11).

Time will be quantified at the educational facility electronically, and the student must attend all the time. If a student misses a portion of class after commencement, they can make it up during the day, evening, or weekend schedule.

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 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)

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.

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 course is not graded, it is a pass/fail course. As the course 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	Infection Control, Safety, & Anatomy	Pass / Fail
Class 4	Lab Skills Development – Hand Draws & Dermal Sticks	Pass / Fail
Class 5	Circulatory System, Capillaries, & Specimen Handling	Pass / Fail
Class 6	Lab Skills & Development- Centrifuge & Dermal Sticks	Pass / Fail
Class 7	Additional Tests & Difficult Collections	Pass / Fail
Class 8	Lab Skills Development- Hands-On Practice/Activity	Pass / Fail
Class 9	Lab Skills Development- Hands-On Practice	Pass / Fail
Class 10	Study Guide & Test Review	Pass / Fail
Class 11	Practical Exam	Pass / Fail
Class 12	National Exam	Pass / Fail

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.

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 48-hour course 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

Optional National Certificate Requirements

In addition to passing the practical evaluation, we encourage students to sit for the National Exam. Students that pass the National Exam will receive their National Certified Phlebotomy Technician Certification. The testing entity will either be the NHA or the NHCO and the exam is administered by an authorized proctor.

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.

Dress Code

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

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.

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. **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 Alexis Treu, COO, 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:

Oklahoma City- 3535 NW 58th Street, Suite 100, Oklahoma City, OK 73112

Tulsa- 5801 E 41st Street, Suite 104, Tulsa, OK 74135

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.

Exam and Learning Resource Information

Phlebotomy Training Specialists proctor the National Healthcare Certification Organization (NHCO) Exam. The NHCO can be contacted at 866-856-6082. This examination, when successfully passed, grants a National Certification. This certification must be renewed every two years. Renewal information can be found at healthcarecertifications.com.

The NHCO Exam is a separate fee of \$115. The exam will be given at our facility on the last day of class. If the student chooses NOT to take the NHCO exam, they will still receive a certificate of completion from our school.

PTS students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcare 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.

Phlebotomy Training Specialists uses a training system in which they provide students with all of the resources they need to complete class and attain the knowledge to prepare for and pass the certification exam. This is similar if not identical to how most Phlebotomy programs operate.

Our system coupled with our practiced exams and quizzes have proven to be sufficient in their entirety for students to be successful in their Phlebotomy Training.

To further add to our student's success, we have compiled a learning resource library that students can refer to that uses information directly from the source. This learning resource library is available to all students, current and graduated to keep up to date as the source material is updated.

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.

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 48 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. The final written exam is optional but strongly suggested. One watch and critique test will be given. If the entire course is completed satisfactorily, a certificate of completion will be awarded to the student after the course 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 course is a stand-alone course, 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.

1. 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. Should Alexis Treu, COO & Administrative Official, or designee fail to or give an unacceptable address to the grievance, the student may file a complaint with the OBPVS. The complaint shall be in writing and shall contain at least the following information:
 - i. The name, address, and telephone number of the person making the complaint;
 - ii. The name and address of the school;
 - iii. The course enrolled and starting date of the class;
 - iv. A brief, clear description of the complaint(s) including detailed information regarding names of instructors, school personnel, type of equipment, class involved, or the specific part of catalog or enrollment, class involved, or the specific part of catalog or enrollment agreement which may be involved in the complaint;
 - v. Documents supporting the complaint, such as copies of the contract and enrollment agreement, receipts of payments made, letters or other correspondence relating to the complaint, or copies of electronic communications;
 - vi. The remedy, if any, that the person is seeking;
 - vii. A statement authorizing the release of whatever information may be necessary to investigate the complaint;

viii. The signature of the person making the complaint and the date of the complaint

- Mail to:
OBPVS
3700 N Classen Blvd, Ste 250,
Oklahoma City, OK 73118
(405) 528-3370

Cancellation and Refund Policy

An applicant denied admission by the school is entitled to a refund of all monies paid.

Three-Day Cancellation: An applicant who provides written notice of cancellation within three days (excluding Saturday, Sunday, and federal and state holidays) of signing an enrollment agreement is entitled to a refund of all monies paid. No later than 30 days of receiving the notice of cancellation, the school shall provide a 100% refund.

Other Cancellations: An applicant requesting cancellation more than three days after signing an enrollment agreement and making an initial payment, but prior to entering the school, is entitled to a refund of all monies paid (*less the \$85 registration fee*).

Refund after the commencement of classes:

1. Procedure for withdrawal/withdrawal date:

- a) A student choosing to withdraw from the school after the commencement of classes is to provide written notice to the Administrative Official of the school. The notice is to indicate the expected last date of attendance and be signed and dated by the student.
- b) A student will be determined to be withdrawn from the institution if the student has not attended any class for 5 consecutive class days. Refunds will be issued within 30 days based on classes attended per the schedule below or student can reschedule the class.
- c) All refunds will be issued within 30 days of the determination of the withdrawal date.

2. Tuition charges/refunds:

- a. Through the 3-Day Cancellation Period, the student is entitled to a refund of 100% off the tuition and additional fees paid.
- b. After the 3-Day Cancellation period, or after the commencement of

classes, the tuition refund, minus \$85 registration fee, shall be determined as follows:

Tuition Refund Policy and Table

If a student cancels their enrollment agreement after attending class, a pro-rata refund will be made of all unearned prepaid tuition according to the table below.

Attended 1 or 2 AM/PM Classes or 1 Weekend Class (Up to 8 hours)	75% full tuition/fees amount less registration fee
Attended 3 or 4 AM/PM Classes or 2 Weekend Classes (Up to 16 hours)	50% full tuition/fees amount less registration fee
Attended 5 or 6 AM/PM Classes or 3 Weekend Classes (Up to 24 hours)	25% full tuition/fees amount less registration fee
Attended 7 or more AM/PM Classes or 4 or more Weekend Classes	No Refund

These calculations 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 cardholder.

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

A student will be determined to be withdrawn from the institution if the student has not attended three consecutive modules. The student will receive a prorated refund based on the classes attended. The refund will be issued after 30 days based on classes attended.

**All requests to withdraw must be submitted in writing to:
payments@phlebotomyusa.com

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 course. 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. 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/UNIT

Course 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- Infection Control, Safety, & Anatomy	4	0	4
Class 4- Lab Skills Development- Hand Draws & Dermal Sticks	0	4	4
Class 5- Circulatory System, Capillaries, & Specimen Handling	4	0	4
Class 6- Lab Skills Development- Centrifuge and Dermal Sticks	0	4	4
Class 7- Additional Tests & Difficult Collections	4	0	4
Class 8- Lab Skills Development – Hands on Practice/Activity	0	4	4
Class 9- Lab Skills Development- Hands On Practice	0	4	4
Class 10- Study Guide & Test Review	4	0	4
Class 11- Practical Exam	0	4	4
Class 12- National Exam	4	0	4
Total Hours	24	24	48

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.

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.