



PHLEBOTOMY

TRAINING SPECIALISTS

Oregon Course Catalog

8800 SE Sunnyside Ave, Suite 218S,
Clackamas, OR 97015

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info@phlebotomyusa.com

701-404-9434

Dates- Jan 1st, 2024 to Dec 31st, 2024

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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

Governing Bodies

Oregon Higher Education Coordinating Commission

3225 25th Street SE
Salem Oregon 97302

National Centers for Competency Testing – NCCT

Desiree Bollinger
7007 College Blvd
Suite 385
Overland Park Kansas 66211

National Healthcare Certification Organization – NHCO

Andrea Migliaccio

Contact Information

School Addresses:

8800 SE Sunnyside Ave, Suite 218S, Clackamas, OR 97015

4494 River Road N, Suite 101, Keizer, OR 97303

4800 SW Griffith Dr. Suite 210, Beaverton, OR 97005

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

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

Email: info@phlebotomyusa.com Website: www.phlebotomyusa.com

Programs/Courses Offered

1 Certificate Program: Phlebotomy Technician Training & Certification

Course/Program Length: 48 Hour

Program/Course Cost

<u>Tuition</u>	<u>Registration</u>	<u>Books/Supplies/Equipment</u>	<u>Total Tuition/Fee</u>	<u>National Exam</u>
\$735.00	\$125.00 (NON-REFUNDABLE AFTER 3 BUSINESS DAYS)	\$250.00	\$1,110.00	\$115.00 (paid to a third party)

Total for Phlebotomy Training Program & Exam = \$1225.00

Payment Policy

Tuition and fees for class can be paid by logging into your student account at students.phlebotomyusa.com. We accept all major credit cards. A \$125 minimum is required at the time of registration. After the initial registration fee of \$125 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: \$100.00 – Refundable on a pro rata basis in accordance with tuition.

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

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

Class Schedule

Evening: 6 pm to 10 pm – Monday – Thursday (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	Jan 3
Jan Eve	8, 9, 10, 11, 16, 17, 18, 22, 23, 24, 25, 29	Jan 3
Jan / Feb Weekend	13, 20, 27, Feb 3, 10, 17	Jan 8

Feb Day	5, 6, 7, 8, 12, 13, 14, 15, 20, 21, 22, 26	Jan 31
Feb Eve	5, 6, 7, 8, 12, 13, 14, 15, 20, 21, 22, 26	Jan 31
Mar Day	4, 5, 6, 7, 11, 12, 13, 14, 18, 19, 20, 21	Feb 28
Mar Eve	4, 5, 6, 7, 11, 12, 13, 14, 18, 19, 20, 21	Feb 28
Mar / Apr Weekend	2, 9, 16, 23, 30, April 6	Feb 26
April Day	1, 2, 3, 4, 8, 9, 10, 11, 15, 16, 17, 18	March 27
Apr Eve	1, 2, 3, 4, 8, 9, 10, 11, 15, 16, 17, 18	March 27
Apr / May Weekend	20, 27, May 4, 11, 18, June 1	Apr 15
May Day	Apr 29, 30, May 1, 2, 6, 7, 8, 9, 13, 14, 15, 16	Apr 24
May Eve	Apr 29, 30, May 1, 2, 6, 7, 8, 9, 13, 14, 15, 16	Apr 24
June Day	3, 4, 5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 29
June Eve	3, 4, 5, 6, 10, 11, 12, 13, 17, 18, 20, 24	May 29
June / July Weekend	15, 22, 29, July 6, 13, 20	June 10
July Day	8, 9, 10, 11, 15, 16, 17, 18, 22, 23, 24, 25	July 3
July Eve	8, 9, 10, 11, 15, 16, 17, 18, 22, 23, 24, 25	July 3
Aug Day	5, 6, 7, 8, 12, 13, 14, 15, 19, 20, 21, 22	July 31
Aug Eve	5, 6, 7, 8, 12, 13, 14, 15, 19, 20, 21, 22	July 31

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

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.

Discrimination Policy

Phlebotomy Training Specialists warrant that it will not discriminate or permit discrimination against any person or group of persons on the grounds of race, color, religious creed, age, marital status, national origin, sexual orientation, or any disability, physical or mental. Any person unlawfully discriminated against, as described in ORS 345.240, may file a complaint under ORS 659A.820 with the Commissioner of the Bureau of Labor and Industries. Any instructor or staff member found guilty of any discriminatory act will be dismissed by the institution immediately.

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 \$10 non-refundable registration fee. All refunds will be processed within 30 days of the deadline of the new start date, determined in accordance with the school's refund policy.

Employment Advisory Services

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

We do the following for students:

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

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

Resume Writing – All students will be encouraged to send in their resumes to our on-staff professional resume writers. The writers will then assist the students with

fine-tuning their resume(s) by way of suggestion(s). The writers will also assist the students with putting their resume(s) into a medical format called a Curriculum Vitae.

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

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

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

Attendance Requirements

Attendance is mandatory for all students regardless of their current level of knowledge. This course is not graded, it is a pass/fail course. Because of this, lack of attendance can affect 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.**

OR

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 halfway mark of their scheduled cohort, they will need to contact Student Services at (701) 404-9434 to pay in FULL and reschedule missed classes. Rescheduling will be based on class availability.

Scheduled Absence(s)

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

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.

Progress Report

All students will be evaluated and receive a progress report throughout the course. Every student will be evaluated on the following practical skills during the Lab Skills Development classes:

- Venipuncture draws
- Butterfly draws
- Capillary sticks

If a student is not meeting the minimum course grade on the evaluations above, the remediation policy will be followed. A final Graduation Evaluation will be given on the second to last day of the course testing the knowledge and proficiency of the

practical skills above. The results of these evaluations will be kept as part of the student's permanent record.

Graduation Evaluation

A final Graduation Evaluation will be given on the second to last day of the course testing the knowledge and proficiency of the practical skills below:

- Venipuncture draws
- Butterfly draws
- Capillary sticks

The results of these evaluations will be kept as part of the student's permanent record.

Grading System

Class 1	Introduction to Phlebotomy	Pass / Fail
Class 2	Lab Skills Development – First Blood Draws	Pass / Fail
Class 3	Test tubes, Panels/Profiles, Special Handling and Procurement, Bodily Fluids Collection	Pass / Fail
Class 4	Lab Skills Development – Hand Draws & Dermal Sticks	Pass / Fail
Class 5	Laboratory Sections, Anatomy and Physiology, Hemodialysis AV Fistula & Grafts	Pass / Fail
Class 6	Lab Skills & Development- Centrifuge & Dermal Sticks	Pass / Fail
Class 7	Protections and Precautions, Employment Guide, Glossary and Study Guide Review	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 Review, Test Prep, Q&A Session	Pass / Fail
Class 11	Practical Exam	Pass / Fail
Class 12	National Exam	Pass / Fail

Graduation and Certificate of Training Requirements

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

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

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

Students who complete the 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 of the student's circumstances.

Records

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

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

Dress Code

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

Leave of Absence

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

Conduct & Dismissal Policy

If a student is dismissed permanently, the refund policy will be in effect based on the percentage of class attended. The last session of attendance will be the date of dismissal. Students are expected to maintain professional conduct within the classroom. Phlebotomy Training Specialists reserve the right to enact disciplinary procedures (outlined below). The following is a list of enumerating behaviors that are unacceptable in the classroom setting. These examples of impermissible behavior described below are not intended to be an all-inclusive list. Phlebotomy Training Specialists managers have full discretion and any violation of the policies or conduct considered inappropriate or unsatisfactory will be subject to disciplinary action, up to and including dismissal from the program.

1. **Language / Interpersonal Conduct**

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

2. **Conduct**

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

3. **Safety**

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

4. **Mental/Physical State**

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

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

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

6. **Automatic Dismissal**

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

Dismissal Procedures:

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

All dismissal procedures will be determined by at least three Phlebotomy Training Specialists management team members, including a consultation with the issuing staff member. Any student who wishes to appeal Phlebotomy Training Specialists’ final decision, shall do so in writing. Any dismissed student may attain reentry into the program(s) by contacting PTS’ founder, Brian Treu, and discussing with him 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:

Clackamas- 8800 SE Sunnyside Ave, Suite 218 S, Clackamas, OR 97015

Keizer- 4494 River Road N, Suite 101, Keizer, OR 97303

Beaverton- 4800 SW Griffith Dr, Suite 210, Beaverton, OR 9700

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

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

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.

Housing

Phlebotomy Training Specialists does not maintain dormitory facilities. PTS is not responsible for finding or assisting students in locating housing. Estimated rental according to local housing agencies, rent for one-to-four-bedroom units ranges from \$600 to \$1,200 per month.

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

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.

Student Grievance Procedure

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

1. The student shall first attempt to address the grievance informally with the instructor or applicable staff member and try to resolve it. If unsuccessful, proceed to the written grievance procedure.
2. Students may state the grievance in writing to the administrator or designee. Please submit the written request within **60 days** of the occurrence to the COO, Alexis Treu info@phlebotomyusa.com or 701-404-9434, she will assist you in resolving your concerns. She will investigate the grievance within 5 business days of receiving the complaint by contacting the student via email or phone to set up a meeting. In the meeting, Ms. Treu will discuss the complaint, allow the student to be heard, and discuss an amicable resolution to the complaint. Written notification of the resolution will be sent via email to the student within 10 days after the student meeting.
3. In her absence, you can contact the Student Service Manager at info@phlebotomyusa.com or **801-669-2056**. They will contact the student within 5 days or receive the complaint via email or phone to set up a meeting. In the meeting, they will discuss the complaint, allow the student to be heard, and discuss an amicable resolution to the complaint. The Student Services Manager will consult with the School/Company President and written notification via email of the resolution will be sent to the student within 10 days after the meeting.
4. "Students aggrieved by action of the school should attempt to resolve these problems with appropriate school officials. Should this procedure fail students may contact: Higher Education Coordinating Commission, Private Career Schools, 775 Court St. NE, Salem, OR 97301." After Consultation with appropriate Commission staff and if the complaint alleges a violation of

Oregon Revised Statutes 345.010 to 345.470 or standards of the Oregon Administrative Rules 715-045-0001 through 715-045-0210, the Commission will begin the complaint investigation process as defined in OAR 715-045-0023 Appeals and Complaints.

Cancellation & Refund Policies for Resident Education

Cancellation Resident Instruction (OAR 715-045-0036)

A student may cancel enrollment by giving written notice to the school at payments@phlebotomyusa.com Unless the school has discontinued the program of instruction, the student is financially obligated to the school.

If cancellation occurs within five business days of the date of enrollment, and before the commencement of classes, all monies specific to the enrollment agreement shall be refunded.

Student's Right to Cancel Void After: _____

If cancellation occurs after five business days of the date of enrollment, and before the commencement of classes, the school will retain the \$125 Enrollment Fee. PTS will allow this \$125 to be applied to ANY future class the student may wish to attend.

If withdrawal or termination occurs after the commencement of classes and before completion of 75% of the contracted instruction program, the student shall be charged tuition according to the percentage of class completed. Each class consists of 8.33% of the program. If a student does not complete the entire session, then that session will not be counted against them when calculating the refund. Termination of students is on a case-by-case basis at the discretion of the instructor/school. Reasons may include foul language, sexual misconduct or harassment. Completion of an entire class session will be used for the calculation, if a student leaves before class dismisses for the session, that session will not be counted towards a completed session. If a student completes more than 50% of the class and then requests to withdraw from the class, no refund will be issued. If withdrawal or termination occurs after completion of 50% or more of the program, the student shall be obligated for the tuition charged for the entire program and shall not be entitled to any refund;

In addition to the pro-rated tuition, the school may retain the book fees, enrollment fees, and other legitimate charges owed by the student. 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. PTS does not charge a withdrawal fee. If the National Exam is not attempted, the Exam Fee is refundable.

PTS is considered a short-term program designed to be completed in one (1) term or four (4) months, whichever is less, and therefore can require payment of all tuition and fees on the first day instruction begins, but does not do so in all cases.

Within 40 days after notification of such cancellation, withdrawal, termination, or completion, a written statement showing allowable charges and total payments received shall be delivered to the student by the school, together with a refund equal in amount to monies paid to the school in excess of those allowable charges.

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.

Sample Certificate

Certificate Of Training

Phlebotomy Technician

Sample Student

has satisfactorily completed the course in Phlebotomy training, which includes techniques and performance of all forms of venipunctures, and has demonstrated competence to perform these procedures in a workplace setting.

Dated this, the 30th day of January, 2017



Brian Sterling Treu
Brian Sterling Treu, Director.

888-531-8378
www.PhlebotomyUSA.com

CERTIFICATE # OR-2017-117

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 healthcare personnel, clients, and the general public. The presentation includes equipment and additives, basic anatomy, and safe and effective venipuncture techniques. Emphasis will be placed on collection techniques, specimen processing, workflow practices, referrals, and utilizing laboratory information systems.

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

B. METHOD OF INSTRUCTION:

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

C. 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

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.